

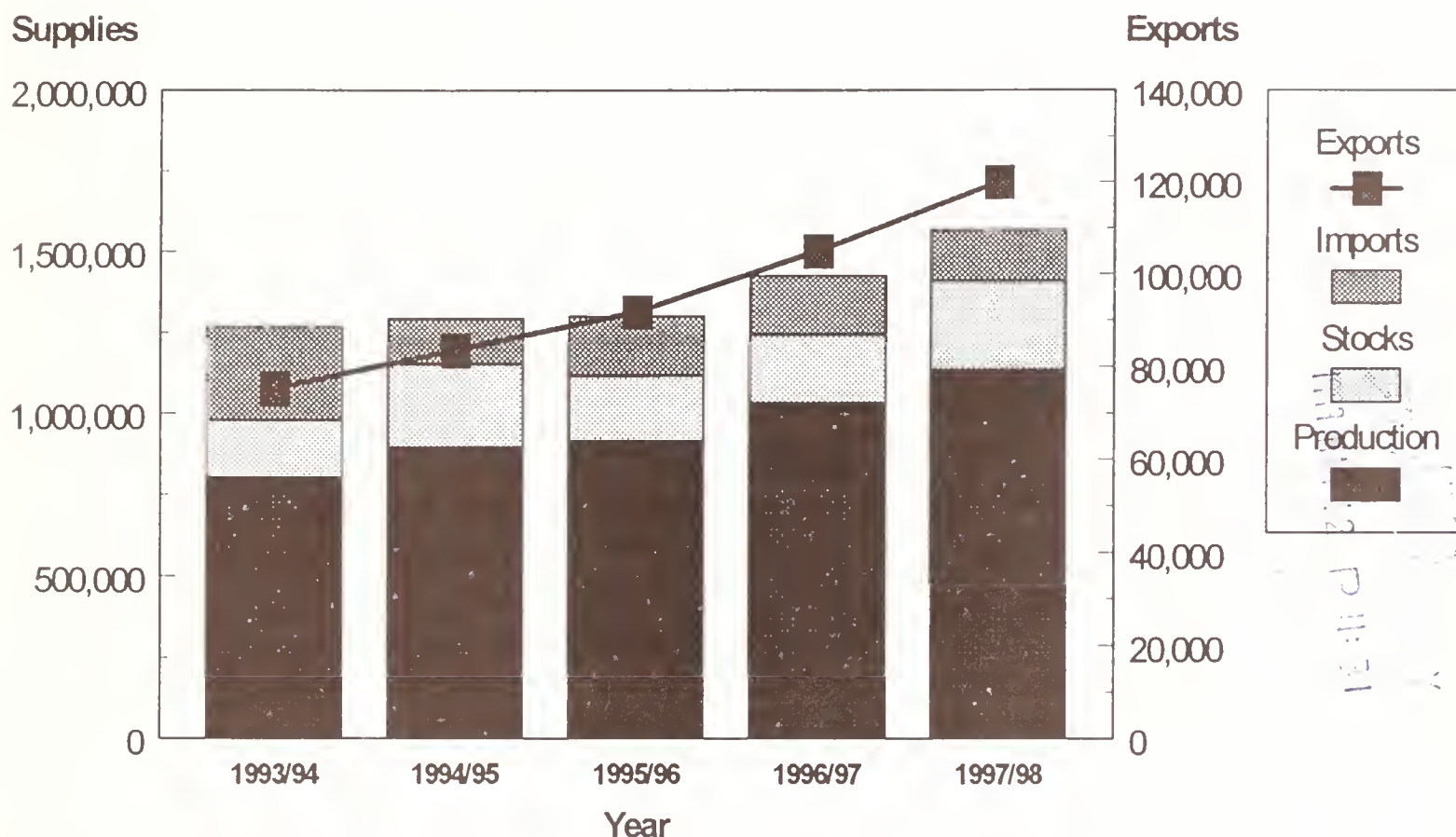
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# World Horticultural Trade and U.S. Export Opportunities

## U.S. Orange Juice Exports Continue at Record Pace



Source: U.S. Bureau of Census  
 Marketing year is December - November  
 Units measured in metric tons, 65 degrees brix

U.S. orange juice exports continue to increase as orange juice supplies rise. U.S. orange juice production in 1997/98 is forecast at a record 1.13 million metric tons (65 degrees brix), 10 percent above the previous season's output. U.S. exports of orange juice in 1997/98 are forecast at a record 120,000 tons, 15 percent above the previous year's shipments. Florida accounts for most of the U.S. orange juice production and exports. During the 1980's, Florida's citrus groves were hit by freezes, resulting in dramatically decreased U.S. production. Since 1989, Florida growers have planted farther south, and the new groves have been reaching record production levels. Increased demand for higher quality single strength juice and strong marketing efforts by private companies have boosted exports in recent years. Major U.S. customers are expected to continue to be the European Union (EU), Canada, Japan, and Korea. Even though the U.S. product is more expensive than the Brazilian product, the quality is superior and consumers are willing to pay for the "fresh squeezed" taste associated with U.S. orange juice.

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<b><u>ANALYSIS</u></b>		
Frank Hokana	720-0875	Sugar, cocoa, and coffee production
Sam Rosa	202-720-6086	Fresh deciduous fruit, apple juice, olives, stone fruit, and CBI
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Bill Janis	202-720-0897	Fresh and processed potatoes, tree nuts, and tropical fruits
Bob Knapp	202-720-4620	Canned deciduous fruit and kiwifruit
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, melons, bananas, nursery products, and cut flowers
Debra A. Pumphrey	202-720-8899	Coffee, cocoa, spices, essential oils, ginseng, and trade forecasts
Stephanie Riddick	202-720-9792	Dried fruit, avocados, beer, hops, berries, and circular coordinator
Joe Somers	202-720-2974	Situation and outlook group leader, processed citrus, trade forecast coordinator, FAO citrus liaison, and circular editor
Debbie Seidband	202-720-6877	Sugar, honey, and fresh citrus
Yvette Wedderburn Bomersheim	202-720-9903	Wine and brandy, table grapes, GSM-102 export credits, NAFTA coordinator and supplier credits
Janise Zygmunt	202-720-1176	Organics
<b><u>MARKETING</u></b>		
Ted Goldammer	202-720-8498	Fresh citrus and products, hops, and potatoes
Pamela McKenzie	202-720-8495	Canned deciduous fruit, grape juice, cranberries, kiwifruit, and honey
Steve Shnitzler	202-720-8495	Avocados, ginseng, apricots, papaya, dates, figs, cut flowers
Gina Castelnovo	202-720-0898	Wine, brandy, berries
Kelly Strzelecki	202-690-1341	Dried fruit, organics
James Carlson	202-720-0911	Fresh deciduous fruit
Ingrid Mohn	202-720-5330	Tree nuts



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### Export Summary

U.S. exports of horticultural products to all countries in November totaled \$974 million, up five percent from the same month a year earlier. Eleven out of 15 categories registered increases. Categories with the most significant increases in November were fresh vegetables (up \$14.4 million or 17 percent), wine (up \$10.0 million or 38 percent), dried fruit (up \$7.9 million or 22 percent), and canned and prepared fruit (up \$7.3 million or 45 percent). The category with the most significant decrease was fresh citrus (down \$9.3 million or 16 percent). In November 1997, 5 of the top 10 U.S. markets showed increases. Mexico registered the largest increase (up 29 percent over the same month a year ago). The largest decrease was to Brazil (down 36 percent). For FY 1998 to date (October/November), the total value of U.S. horticultural exports was \$1.98 billion--1 percent below FY 1997.

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All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds,  
1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon,  
1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

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U.S. Exports of Selected Horticultural Products

Name		Quantity				Values (1000 Dollars)				
Group & Product	Nov	Nov	Oct-Nov	Oct-Nov	Oct-Sep	Nov	Nov	Oct-Nov	Oct-Nov	Oct-Sep
	FY 1996	FY 1997	FY 1996	FY 1997	FY 1996	FY 1996	FY 1997	FY 1996	FY 1997	FY 1996
<b>Fresh Citrus MT</b>										
Grapefruit	41,441	38,721	75,165	71,478	484,403	22,153	17,098	38,936	32,099	240,408
Lemons	12,978	10,842	22,523	22,103	120,279	14,942	9,111	24,057	24,744	120,656
Oranges, Incl. Tm	27,615	32,962	38,605	54,461	590,428	15,871	18,491	22,384	31,740	323,203
Other Citrus	4,916	4,288	6,943	5,661	28,696	4,216	3,131	6,072	4,169	23,786
Subtotal:----	86,949	86,813	143,236	153,703	1,223,805	57,181	47,831	91,449	92,752	708,053
<b>Fresh Fruit, Non-Citrus MT</b>										
Apples	92,405	72,032	158,470	125,214	689,749	55,504	41,803	95,483	76,402	412,371
Avocados	639	239	1,556	339	5,819	447	325	1,225	435	8,215
Cherries Swt &trt	43	665	375	1,458	39,400	138	621	529	1,871	140,144
Grapes	27,302	45,788	67,941	87,065	233,558	43,443	58,106	100,386	109,957	309,727
Kiwifruit	572	819	976	1,428	5,438	700	722	1,199	1,316	7,036
Melons	6,457	7,617	15,804	16,275	219,681	3,180	3,647	7,652	8,152	79,289
Papaya	615	493	1,216	992	6,589	1,478	1,211	2,931	2,469	16,738
Peaches & Nectrns	393	551	1,976	2,918	103,345	325	411	1,586	2,144	92,737
Pears	19,185	29,955	46,687	56,336	126,409	12,187	14,835	27,402	28,386	76,052
Plums/Prunes	286	408	1,802	2,298	71,906	360	367	1,746	2,170	61,224
Strawberries	1,020	1,571	4,921	5,044	52,615	3,219	3,922	12,291	13,266	97,010
Other Non-Citrus	6,064	4,342	13,268	10,567	54,810	6,112	4,826	13,447	12,519	75,169
Subtotal:----	154,979	164,480	314,992	309,933	1,609,320	127,093	130,794	265,876	259,088	1,375,713
<b>Can/Prep Fruit MT</b>										
Cherries, Tart Cn	249	223	582	552	4,916	331	269	827	717	6,338
Fruit Mixtures	2,212	2,063	5,314	4,561	22,475	2,604	2,671	6,362	6,268	27,055
Marachino Cherry	478	631	901	1,046	5,107	1,070	1,349	1,927	2,232	10,672
Peaches, Canned	1,144	1,827	3,287	3,500	16,873	1,121	1,839	3,357	3,454	16,528
Pineapple, Canned	390	239	552	681	3,694	368	245	525	665	3,443
Other Canned Frui	3,745	8,393	7,897	12,425	45,120	4,454	8,523	9,475	12,932	51,682
Other Prep/Preser	4,998	6,938	11,897	14,784	79,816	6,161	8,510	14,508	17,676	83,397
Subtotal:----	13,216	20,314	30,429	37,549	178,001	16,109	23,408	36,980	43,944	199,114
<b>Dried Fruit MT</b>										
Prunes, Dried	5,654	7,283	12,933	14,343	67,535	11,915	14,412	27,317	28,347	138,398
Raisins, Dried	9,896	12,367	25,908	24,009	115,016	17,662	21,735	45,171	42,417	203,954
Other Dried Fruit	1,920	2,439	4,739	5,008	17,313	5,981	7,328	14,172	14,147	50,290
Subtotal:----	17,470	22,089	43,580	43,360	199,864	35,558	43,474	86,660	84,912	392,641
<b>Frozen Fruit MT</b>										
Blueberries, Froz	509	765	1,519	1,256	16,281	970	1,693	2,951	2,700	22,468
Strawberries, Fro	1,839	1,307	3,084	2,620	21,748	2,392	1,805	3,961	3,519	27,686
Other Frozen Frui	1,850	1,835	3,169	3,428	22,046	2,484	2,527	4,475	4,674	28,524
Subtotal:----	4,198	3,907	7,773	7,303	60,075	5,846	6,026	11,387	10,892	78,677
<b>Fruit/Veg Juices KL</b>										
Grapefruit Ju, Cn	3,313	5,495	8,145	9,167	62,477	2,295	2,958	5,230	4,934	41,493
Orange Juice, Con	19,712	15,083	35,449	28,240	381,926	11,622	8,159	23,563	15,741	177,635
Orange Juice, Not	15,067	17,161	29,089	31,313	178,921	10,760	11,482	20,292	21,588	124,874
Other Juices	35,582	42,246	77,815	97,939	467,575	25,693	27,903	53,437	60,945	340,694
Subtotal:----	73,675	79,984	150,498	166,660	1,090,899	50,369	50,502	102,522	103,209	684,695
<b>Fresh Vegetables MT</b>										
Asparagus, Fr, Ch	155	242	261	408	15,160	436	709	713	1,166	50,688
Broccoli	9,434	12,885	16,901	19,781	130,391	6,397	8,198	11,335	14,266	92,215
Cauliflower	7,807	8,464	16,829	13,131	88,279	5,303	5,517	10,913	9,147	57,828
Celery	10,440	10,844	18,219	17,271	117,410	4,068	5,130	6,595	7,707	48,961
Lettuce, Fr Chld	26,512	28,712	52,999	53,388	294,482	14,503	16,956	27,137	33,134	146,612
Onions	26,331	35,164	71,805	71,497	265,121	8,228	10,577	24,174	20,119	92,464
Peppers	5,366	5,250	10,198	9,341	62,493	4,709	5,655	8,431	9,357	52,240
Tomatoes	12,952	10,893	24,756	25,507	153,650	10,769	11,913	19,807	22,544	123,783
Other Vegetables	41,142	44,267	77,366	86,816	780,050	28,484	32,674	62,479	67,799	402,974
Subtotal:----	140,139	156,719	289,334	297,138	1,907,035	82,896	97,329	171,583	185,237	1,067,765

U.S. Exports of Selected Horticultural Products

Name		Quantity				Values (1000 Dollars)					
Group	& Product	Nov	Nov	Oct-Nov	Oct-Nov	Oct-Sep	Nov	Nov	Oct-Nov	Oct-Nov	Oct-Sep
		FY 1996	FY 1997	FY 1996	FY 1997	FY 1996	FY 1996	FY 1997	FY 1996	FY 1997	FY 1996
Veg Canned	MT										
	Ketchup	4,072	3,859	7,446	7,250	40,186		2,956	2,698	5,459	30,568
	Sweet Corn, Canne	19,361	13,704	34,513	28,296	203,469		16,438	11,393	28,439	167,353
	Tomato Paste	9,530	15,686	21,368	24,690	128,954		6,886	9,273	16,170	89,320
	Tomato Sauce	6,747	9,495	15,483	18,052	88,108		6,596	8,521	14,757	84,947
	Other Can Veg	22,541	24,601	45,841	49,241	271,139		28,093	27,904	56,861	339,901
	Subtotal:----	62,257	67,345	124,651	127,530	731,855		60,969	59,788	121,687	712,088
Frozen Vegetables	MT										
	Frozen French Fry	33,550	39,449	65,192	73,821	396,674		24,793	27,755	48,283	294,335
	Fzn Swt Corn	5,767	10,304	10,910	16,918	65,202		4,941	7,995	9,565	56,212
	Other Pot Fzn	2,608	2,965	7,575	4,806	28,798		1,949	1,979	4,686	20,957
	Other Fzn Veg	6,692	6,418	12,017	12,465	72,443		6,356	5,915	11,314	65,425
	Subtotal:----	48,617	59,137	95,695	108,011	563,117		38,038	43,643	73,849	436,929
Veg. Dehyd	MT										
	Garlic Dehyd.	784	857	1,954	2,043	11,820		1,730	1,851	4,094	26,182
	Onions, Dehyd.	2,938	2,963	5,710	5,554	33,170		7,302	7,029	13,709	77,600
	Potatoes, Dehyd	4,122	3,948	7,669	8,457	49,903		4,260	3,958	8,004	49,997
	Other Dehyd Veg	4,296	7,066	10,792	13,139	71,944		6,355	12,590	14,356	114,690
	Subtotal:----	12,139	14,835	26,124	29,193	166,836		19,646	25,427	40,164	268,469
Tree Nuts	MT										
	Almonds, Unshld	3,000	2,907	6,542	7,993	24,735		7,411	6,976	15,787	63,658
	Pistachio, Unshld	725	1,871	1,604	4,130	5,955		2,955	8,334	6,917	27,193
	Walnuts, Shld	3,615	3,883	6,348	7,606	23,936		11,381	11,804	20,703	73,476
	Walnuts, Unshld	10,149	8,769	46,390	29,714	57,187		21,061	16,669	99,560	121,757
	Other Nuts	7,399	13,714	16,721	26,345	67,140		21,227	34,200	45,829	190,950
	Almonds, Sh/Prep	15,157	17,344	44,088	43,526	163,576		78,028	68,393	217,350	816,088
	Subtotal:----	40,044	48,487	121,694	119,313	342,529		142,064	146,376	406,146	1,293,123
Nusery Products	MIXED										
	Cut Flowers	0	0	0	0	0		3,853	3,516	8,001	49,067
	Other Nursery	0	0	0	0	0		14,073	19,848	26,968	172,279
	Subtotal:----	0	0	0	0	0		17,926	23,364	34,969	221,346
Hops & Products	MT										
	Hop Extract	436	347	612	674	3,468		6,083	7,007	9,584	57,080
	Hop Pellets	804	435	1,136	888	6,120		3,505	1,894	6,109	33,737
	Hops, Nfsp	127	78	480	485	1,888		842	1,097	2,719	9,644
	Subtotal:----	1,366	860	2,227	2,047	11,477		10,429	9,998	18,413	100,462
Wine	KL										
	Grape Wines	12,423	17,867	29,368	37,996	194,399		24,627	33,141	56,760	368,160
	Other Wine Prod	1,199	2,060	2,502	3,611	14,294		1,491	2,984	3,320	22,060
	Subtotal:----	13,621	19,927	31,871	41,607	208,693		26,119	36,125	60,080	390,220
Miscellaneous	MIXED										
	Beer & Beverages	62,159	60,639	114,583	110,147	664,850		37,061	42,878	71,107	416,546
	Edible Preparatio	18,798	19,409	38,122	38,644	211,356		76,067	75,952	163,676	933,748
	Ginseng	194	135	469	302	993		15,060	9,884	34,791	72,001
	Potato Chips	4,400	6,190	9,946	12,478	53,599		11,845	15,333	25,755	145,451
	Other Misc	0	0	0	0	0		37,080	45,196	74,737	481,787
	Essential Oils	4,021	3,452	7,333	7,184	46,266		59,769	40,262	101,877	619,388
	Subtotal:----	89,571	89,824	170,452	168,756	977,065		236,882	229,505	471,943	2,668,921
	Grand Total:							927,128	973,590	1,993,708	10,598,216

U.S. Imports of Selected Horticultural Products

Name		Quantity					Values (1000 Dollars)				
Group	& Product	Nov	Nov	Oct-Nov	Oct-Nov	Oct-Sep	Nov	Nov	Oct-Nov	Oct-Nov	Oct-Sep
		FY 1996	FY 1997	FY 1996	FY 1997	FY 1996	FY 1996	FY 1997	FY 1996	FY 1997	FY 1996
Fresh Fruit		MT									
	Apples	13,130	9,829	34,620	24,628	168,564	4,654	3,371	10,363	7,323	82,736
	Avocados	8,125	7,397	14,610	13,330	27,667	7,768	8,508	13,810	14,639	25,993
	Bananas	301,815	313,367	613,595	632,474	3,727,906	86,674	86,846	177,822	173,972	1,122,747
	Cantaloupe	15,553	21,238	21,201	29,274	396,103	5,987	6,751	6,911	8,572	130,376
	Grapes	272	442	2,470	3,407	351,567	288	609	877	2,234	386,183
	Kiwifruit	1,415	348	2,435	655	37,680	1,207	253	2,298	537	23,524
	Mangoes	3,987	2,110	6,571	4,158	191,115	3,573	2,172	6,890	4,250	123,009
	Peaches	625	675	645	675	41,672	724	782	751	782	32,901
	Pears	747	795	979	1,261	78,521	1,937	2,058	2,579	3,187	50,306
	Pineapples	11,443	18,051	23,085	45,241	171,253	5,197	7,909	10,596	18,324	74,441
	Strawberry	801	366	823	380	15,203	1,743	926	1,766	984	26,844
	Other Melons	19,281	24,231	31,182	36,354	382,903	6,195	6,214	10,177	9,685	96,126
	Other Fruit	44,759	45,249	101,845	105,892	572,146	23,228	25,315	50,512	56,581	297,914
	Subtotal:----	421,953	444,097	854,060	897,728	6,162,300	149,176	151,714	295,352	301,069	2,473,098
Dried Fruit		MT									
	Oried Apricots	1,440	1,484	2,637	3,201	11,237	3,948	3,924	6,919	8,273	31,058
	Ord Figs & Pst	503	1,055	1,425	2,183	3,904	1,087	1,359	3,247	3,361	5,800
	Other Dried Fruit	2,260	2,442	4,420	4,324	26,720	3,983	3,279	7,954	6,066	42,783
	Subtotal:----	4,203	4,981	8,482	9,708	41,862	9,018	8,562	18,120	17,700	79,640
Frozen Fruit		MT									
	Fzn Blueberries	1,038	1,200	2,744	2,728	13,177	2,107	2,245	5,392	5,257	26,173
	Fzn Strawberries	164	255	395	527	22,279	180	270	474	559	20,207
	Other Fzn Fruit	2,220	2,175	4,728	4,416	35,774	2,441	2,512	5,486	5,001	41,924
	Subtotal:----	3,422	3,631	7,867	7,671	71,230	4,728	5,026	11,352	10,817	88,304
Canned/Prep Fruit		MT									
	Canned Olives	5,936	7,383	12,358	14,914	81,516	15,563	15,996	32,925	32,053	184,250
	Canned Oranges	3,280	3,279	6,785	7,609	56,289	3,365	2,973	6,915	6,963	54,784
	Canned Peaches	3,521	1,940	8,049	4,006	29,483	2,272	1,303	5,238	2,762	19,709
	Canned Pineapples	16,926	22,366	41,432	46,946	292,609	11,950	16,235	29,331	34,103	204,974
	Mixed Fruit	3,712	3,290	5,805	6,089	49,307	3,492	3,634	5,909	7,034	51,241
	Prep/Pres Fruit	7,269	8,245	13,408	16,445	101,420	8,518	9,522	16,112	19,250	118,537
	Other Canned Frui	4,486	4,830	11,123	10,751	69,225	6,294	6,261	14,336	15,191	84,661
	Subtotal:----	45,131	51,334	98,960	106,759	679,851	51,453	55,925	110,766	117,356	718,155
Frt&Veg Juice SSE		KL									
	Apple Juice	99,011	77,663	161,134	158,118	1,084,986	31,518	20,947	54,851	41,501	354,632
	Fcoj	144,383	46,795	273,152	127,549	1,099,876	32,778	7,669	64,080	21,784	233,077
	Grape Juice	14,918	12,340	34,909	28,707	243,290	5,315	4,765	11,973	11,385	95,051
	Pineapple Juice	17,585	16,418	45,599	38,330	303,510	5,344	4,742	12,925	11,458	88,786
	Other Juices	17,622	20,430	35,190	44,836	293,196	10,006	12,256	20,254	25,998	167,223
	Subtotal:----	293,518	173,646	549,985	397,540	3,024,858	84,961	50,379	164,083	112,126	938,770
Fresh Vegetables		MT									
	Garlic	217	295	844	446	17,570	352	485	1,271	802	20,661
	Asparagus	3,849	4,822	7,762	9,265	38,745	6,420	8,925	11,667	15,926	66,588
	Bell Pepper	9,965	9,299	15,186	14,919	180,463	12,763	13,524	19,215	20,922	206,072
	Carrots	13,313	15,028	25,603	26,958	99,470	3,044	3,404	5,648	5,997	22,353
	Chili Pepper	6,120	9,192	15,750	21,292	103,758	2,124	7,907	4,930	11,568	45,836
	Cucumbers	37,056	39,660	46,946	50,947	302,306	11,448	12,516	15,642	16,616	100,823
	Onions	14,632	16,907	24,507	26,795	261,088	13,199	13,500	21,786	21,663	127,447
	Potatoes	24,343	35,596	49,538	61,127	324,924	4,400	7,165	9,775	12,642	59,301
	Squash	17,994	17,449	26,065	25,125	141,192	11,077	9,827	15,911	15,372	87,857
	Tomatoes	38,096	38,861	75,233	67,376	743,205	26,407	35,134	51,737	58,653	611,612
	Other Fresh Veg	30,734	40,731	56,058	71,971	453,475	17,939	25,710	31,684	43,937	265,485
	Subtotal:----	196,319	227,839	343,492	376,220	2,666,196	109,173	138,095	189,266	224,098	1,614,035



U.S. Imports of Selected Horticultural Products

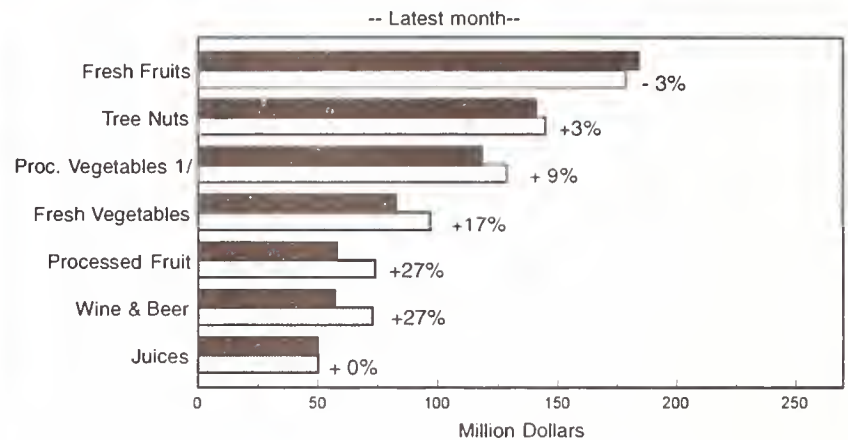
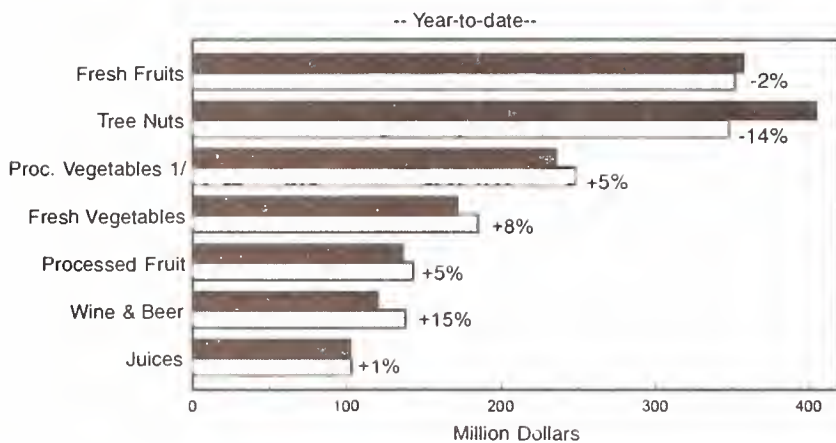
Name		Quantity					Values (1000 Dollars)					
Group	& Product	Nov	Nov	Dct-Nov	Dct-Nov	Oct-Sep	Nov	Nov	Dct-Nov	Dct-Nov	Oct-Sep	
		FY 1996	FY 1997	FY 1996	FY 1997	FY 1996	FY 1996	FY 1997	FY 1996	FY 1997	FY 1996	
Canned/Dehyd Vegetables MT												
	Cnd Artichokes	2,379	1,607	4,494	3,806	29,298		3,826	2,346	7,422	5,575	44,069
	Cnd Bamboos	2,976	3,297	6,502	7,639	27,077		2,806	2,571	6,074	5,788	24,292
	Cnd Mushrooms	5,818	4,305	10,727	8,776	67,258		10,583	7,556	19,831	15,332	118,324
	Cnd Pimiento	990	584	1,936	1,638	9,556		1,249	698	2,459	1,921	11,448
	Cnd Tomatoes	5,697	6,762	12,452	13,040	65,589		2,444	3,069	5,478	5,989	27,979
	Cnd Waterchnuts	1,084	2,827	2,700	5,714	35,531		1,233	1,860	2,911	3,824	27,403
	Tomato Pst & Sauc	2,366	1,238	4,579	2,443	33,659		2,140	1,277	4,951	2,691	41,356
	Dried Mushrooms	86	109	186	209	2,015		1,288	1,423	2,541	2,929	19,411
	Dried Tomatoes	757	594	1,878	1,143	6,924		2,829	2,152	6,961	4,211	26,265
	Dther Dehy Veg	18,322	9,998	30,530	21,689	159,374		14,211	10,908	26,612	23,166	159,001
	Other Can Veg	19,622	22,741	42,020	46,437	244,159		18,118	20,037	38,210	41,399	214,284
	Subtotal:----	60,095	54,062	118,004	112,536	680,441		60,727	53,897	123,452	112,826	713,831
Frozen Vegetables MT												
	Broccoli Fzn	14,779	16,257	30,826	31,682	169,458		9,645	10,040	19,682	19,847	106,080
	Cauliflower Fzn	2,517	3,832	5,400	6,187	18,729		2,013	2,534	3,989	4,076	14,060
	Potato Fzn	21,909	31,595	41,351	62,660	286,808		13,254	19,481	25,196	38,365	169,323
	Dther Veg Fzn	11,809	12,400	28,038	29,157	222,015		10,086	11,298	21,731	23,104	129,143
	Subtotal:----	51,014	64,083	105,615	129,686	697,010		34,998	43,353	70,598	85,392	418,606
Tree Nuts MT												
	Brazils Tot	705	967	1,536	2,413	10,404		2,118	3,287	4,705	7,785	23,656
	Cashews Tot	4,908	5,048	9,990	12,841	62,669		23,464	23,539	48,080	59,005	292,315
	Coconut	3,244	3,694	7,685	7,064	39,782		2,918	2,659	7,121	5,185	34,791
	Pecans	5,281	4,657	6,812	6,676	19,909		6,762	11,836	10,806	16,237	39,667
	Other Nuts	3,364	3,977	5,573	6,906	18,167		12,236	13,456	20,608	24,339	78,070
	Subtotal:----	17,501	18,342	31,596	35,901	150,931		47,498	54,778	91,320	112,551	468,499
Nursey Products MIXED												
	Carnations	109,049	98,041	191,426	190,084	1,211,423		9,987	9,726	16,759	18,004	115,014
	Christmas Trees	1,653	1,892	1,655	1,892	2,260		14,644	16,403	14,658	16,406	20,227
	Chrysanthemus	63,109	56,751	120,063	109,173	614,707		9,194	9,298	16,902	17,790	91,126
	Roses	61,513	66,890	132,537	151,634	919,298		11,509	15,177	24,349	33,359	200,957
	Tulip Bulbs	19,325	16,564	80,689	80,024	426,485		2,184	1,539	9,567	9,083	41,993
	Other Cut Flowers	0	0	0	0	0		13,096	15,760	27,142	32,067	186,894
	Other Nursey Prod	0	0	0	0	0		22,957	25,205	49,663	51,981	298,973
	Subtotal:----	254,650	240,139	526,371	532,807	3,174,174		83,572	93,108	159,041	178,690	955,183
Hops & Products MT												
	Hops & Pellets	278	0	355	95	5,606		1,985	1	2,322	365	37,836
	Other Hop Prod	1	1	1	1	187		20	10	25	10	1,339
	Subtotal:----	279	2	357	97	5,793		2,005	12	2,347	375	39,175
Wine KL												
	Red Wine	16,837	19,391	32,730	40,941	181,724		65,826	76,523	126,771	157,266	682,741
	Sparkiling Wine	4,636	5,375	11,464	11,676	30,293		46,298	53,057	117,689	127,250	336,614
	White Wine	10,227	12,756	23,532	27,634	116,091		36,443	45,993	85,370	99,618	411,457
	Dther Wine Prod	5,871	10,066	13,781	18,937	104,101		14,784	23,930	34,871	45,781	198,476
	Subtotal:----	37,571	47,588	81,507	99,188	432,208		163,351	199,503	364,700	429,914	1,629,287
Miscellaneous MIXED												
	Beer & Beverages	115,154	129,859	254,131	286,094	1,734,830		103,561	114,583	228,709	253,926	1,511,285
	Other Misc	0	0	0	0	0		110,764	136,642	240,404	273,010	1,402,504
	Subtotal:----	115,154	129,859	254,131	286,094	1,734,830		214,325	251,224	469,114	526,936	2,913,790
	Grand Total:							1,014,985	1,105,578	2,069,511	2,229,851	13,050,374

# U.S. Horticultural Product and Market Export Summaries

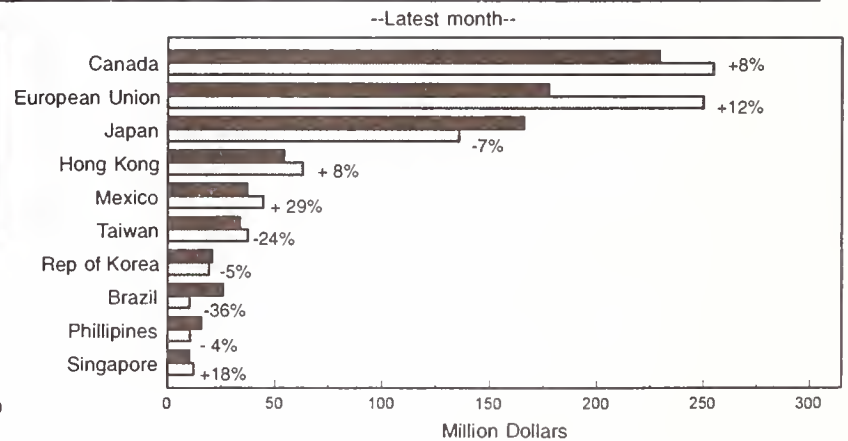
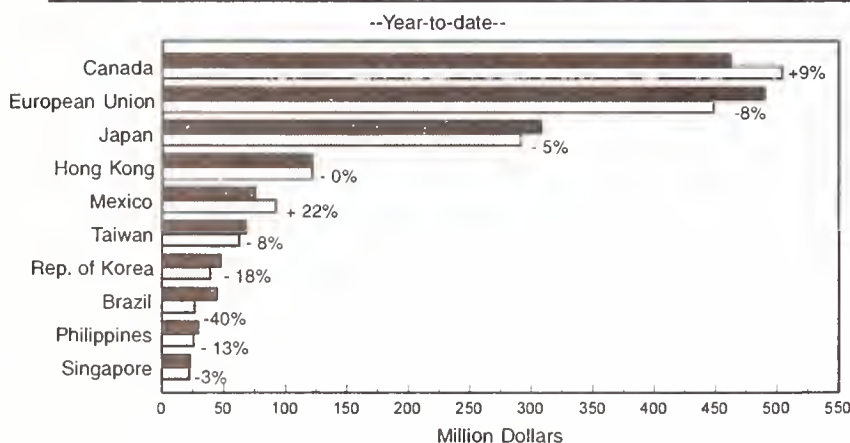
FY Oct-Nov and Latest Month Comparisons

■ FY 97 □ FY 98

## Selected Product Summary



## Top Ten Market Summary



## **EXPORT NEWS AND OPPORTUNITIES**

### **USDA Makes Available \$2 Billion to Assist Sales of U.S. Agricultural Commodities to Southeast Asia and the Republic of Korea**

The United States Department of Agriculture has allocated \$2 billion in credit guarantees to assist sales of U.S. agricultural commodities to Korea and Southeast Asia. USDA has authorized credit guarantee packages to help the Republic of Korea and five countries of Southeast Asia (Indonesia, Malaysia, Philippines, Thailand and Singapore) stabilize and rebuild their markets after the recent financial crisis. The credit guarantees should help ensure that Korea, Indonesia, Malaysia, Philippines, Thailand, and Singapore remain key markets for U.S. horticultural exports.

On December 29, 1997, USDA announced the detailed allocation of its \$1 billion credit guarantee program to assist sales of U.S. agricultural commodities to Korea under the Commodity Credit Corporation's Export Credit Guarantee Program (GSM-102) for fiscal year 1998. Secretary Glickman has assigned \$100 million in coverage for which horticultural products are eligible on a first-come first-served basis.

On January 5, Secretary Glickman announced a \$545 million increase in credit guarantees to the Philippines, Indonesia, Malaysia, Thailand, and Singapore to make it easier for buyers in these countries to import U.S. agricultural commodities and products. As a result, more than \$1 billion in credit guarantees are now available to these countries. As part of this action, USDA has issued five announcements specifying allocation to these Southeast Asian countries under the GSM-102 and the Supplier Credit Guarantee Program (SCGP). These announcements authorize credit guarantees that double the amount of allocations previously announced for Southeast Asian countries. This action also extends a new \$100 million GSM-102 guarantee program to Malaysia. Please see FAS Release PR 0004-98

for country specific details.

The \$1 billion credit guarantee package includes funds made available under the new **Facility Guarantee Program (FGP)**. On December 3, 1997, USDA made available \$40 million in guarantees to Southeast Asia to stimulate the creation or improvement of facilities that will benefit U.S. agricultural exports. Guarantees under the FGP can be used, for example, to improve cold storage facilities that refrigerate primarily U.S. fruits and vegetables, etc. For specific information on the new program, please refer to [http://www.fas.usda.gov/info/factsheets/fgp\\_fact.htm](http://www.fas.usda.gov/info/factsheets/fgp_fact.htm).

The GSM-102 program makes available financing for the sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to 3 years.

Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report.

If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amounts due and

covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

The tables on pages 11 to 13 present FY 1998 GSM-102 allocations by country as of January 2, 1998 for various horticultural commodities and products.

### **Supplier Credit Guarantee Program Status**

The Supplier Credit Guarantee Program (SCGP) is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

The tables on pages 14 through 16 present FY 1998 SCGP allocations by country and product as of January 2, 1998.

*Cautionary information for use of the accompanying GSM and SCGP tables: The tables reflect only exporter applications for guarantees that have been entered into the GSM and SCGP computerized system. At any given time, exporter applications are in process, and not all of those received have been entered into the system. Moreover, all applications are initially entered into the system on a provisional basis until price reviews have been completed, the guarantee fee has been received, and the written guarantee has been issued. Thus, some applications now in the system may in the future be removed, and the commodity balances correspondingly increased.*

Note: The GSM will consider requests to establish a SCGP and/or GSM Program for a country or region or amend an authorized program to include horticultural commodities and products which are currently not eligible. Information on the FY 1998 GSM-102 and

Supplier Credit Guarantee Programs is available on the Internet at <http://www/fas.usda.gov>.

**(For further information on the SCGP or GSM-102 Program for horticultural commodities, contact Yvette Wedderburn Bomersheim, 202-720-9903).**



**FY 1998 GSM-102  
CREDIT GUARANTEE COVERAGE 1/**

<b>Country/Commodity</b>	<b>Announced Allocation (In Millions of Dollars)</b>	<b>Exporter Applications Received (In Millions of Dollars)</b>	<b>Balance (In Millions of Dollars)</b>
<b>ANDEAN REGION</b>	<b>200.0</b>	<b>37.2</b>	<b>162.8</b>
Dried fruit 2/		0.0	
Fresh fruit 3/		0.0	
Frozen fruit (strawberries & blueberries)		0.0	
Potatoes		0.0	
Canned vegetables 5/		0.0	
Frozen vegetables 6/		0.0	
<b>ARGENTINA</b>	<b>16.0</b>	<b>0.0</b>	<b>16.0</b>
Fresh fruit 3/		0.0	
Potatoes		0.0	
<b>BRAZIL</b>	<b>90.0</b>	<b>4.7</b>	<b>85.3</b>
Dried fruit 2/		0.0	
Fresh fruit 3/		2.5	
Hops; hop extract		0.0	
Potatoes		0.0	
Tree nuts 7/		0.0	
Canned vegetables 5/		0.0	
<b>CENTRAL AMERICA REGION</b>	<b>50.0</b>	<b>22.8</b>	<b>27.2</b>
Potatoes		0.0	
<b>CENTRAL EUROPE</b>	<b>10.0</b>	<b>0.0</b>	<b>10.0</b>
Frozen orange juice concentrate		0.0	
<b>CHINA</b>	<b>100.0</b>	<b>24.8</b>	<b>75.2</b>
Fresh fruit (apples & cherries)		0.0	
Hops; hop extract		0.0	
Potatoes		0.0	
<b>EAST AFRICA REGION</b>	<b>35.0</b>	<b>10.6</b>	<b>24.4</b>
Frozen vegetables 6/		0.0	
Tree nuts 7/		0.0	
Potatoes		0.0	
<b>EAST CARIBBEAN REGION</b>	<b>30.0</b>	<b>20.6</b>	<b>9.4</b>
Fresh fruit 3/		0.0	
Canned vegetables 5/		0.0	
<b>EGYPT</b>	<b>100.0</b>	<b>12.0</b>	<b>88.0</b>
Fresh fruit 3/		0.0	
Potatoes		0.0	
<b>INDIA</b>	<b>20.0</b>	<b>0.0</b>	<b>20.0</b>
Dried fruit 1/		0.0	
Tree nuts 7/		0.0	
<b>INDONESIA</b>	<b>250.0</b>	<b>26.0</b>	<b>224.0</b>
Fruit juices		0.0	
Fresh fruit 3/		0.0	
Potatoes		0.0	
Tree nuts 7/		0.0	
<b>KAZAKSTAN</b>	<b>5.0</b>	<b>0.0</b>	<b>5.0</b>
Canned vegetables 5/		0.0	
Frozen vegetables 6/		0.0	
Canned fruit 8/		0.0	
Frozen fruit 4/		0.0	
Frozen orange juice concentrate		0.0	
Potatoes		0.0	
Tree nuts 7/		0.0	

**FY 1998 GSM-102  
CREDIT GUARANTEE COVERAGE 1/**

<b>Country/Commodity</b>	<b>Announced Allocation (In Millions of Dollars)</b>	<b>Exporter Applications Received (In Millions of Dollars)</b>	<b>Balance (In Millions of Dollars)</b>
<b>KOREA</b>	<b>400.0</b>	<b>0.0</b>	<b>400.0</b>
Dried fruit 2/		0.0	
Fresh fruit 3/		0.0	
Potatoes		0.0	
Tree nuts 7/		0.0	
<b>MEXICO</b>	<b>500.0</b>	<b>305.6</b>	<b>194.4</b>
Fresh fruit 3/		0.0	
Hops; hop extract		0.0	
Potatoes		0.0	
Tree nuts 7/		1.9	
Canned fruit 8/		0.0	
<b>PHILIPPINES</b>	<b>20.0</b>	<b>0.0</b>	<b>20.0</b>
Fruit juices		0.0	
Tree nuts 7/		0.0	
<b>POLAND</b>	<b>25.0</b>	<b>0.0</b>	<b>25.0</b>
Fruit juices		0.0	
Potatoes		0.0	
<b>RUSSIA</b>	<b>95.0</b>	<b>19.2</b>	<b>75.8</b>
Canned vegetables 5/		0.0	
Canned fruit 8/		0.0	
Fruit juices		0.0	
Fresh fruit 3/		0.2	
Fresh vegetables 6/		0.0	
Frozen orange juice concentrate		0.0	
Frozen fruit 4/		0.0	
Frozen vegetables 6/		0.0	
Hops; hop extract		0.0	
Potatoes		0.0	
Tree nuts 7/		0.0	

**FY 1998 GSM-102  
CREDIT GUARANTEE COVERAGE 1/**

<b>Country/Commodity</b>	<b>Announced Allocation (In Millions of Dollars)</b>	<b>Exporter Applications Received (In Millions of Dollars)</b>	<b>Balance (In Millions of Dollars)</b>
<b>SOUTHERN AFRICA REGION</b>	<b>50.0</b>	<b>0.0</b>	<b>50.0</b>
Canned fruit 8/		0.0	
Dried fruit 2/		0.0	
Frozen vegetables 6/		0.0	
Potatoes		0.0	
Tree nuts 7/		0.0	
<b>THAILAND</b>	<b>100.0</b>	<b>0.0</b>	<b>100.0</b>
Tree nuts 7/		0.0	
<b>TUNISIA</b>	<b>30.0</b>	<b>0.7</b>	<b>29.3</b>
Tree nuts 7/		0.0	
<b>TURKEY</b>	<b>250.0</b>	<b>117.5</b>	<b>132.5</b>
Canned vegetables 5/		0.0	

1/Coverage is detailed in FAS Program Announcements for all commodities, including those not listed as of January 2, 1998. FAS news releases are available on the Internet at <http://www.fas.usda.gov>. Unless otherwise noted, terms are FOB, 90-days to 3 years. 2/Raisins, prunes, dates, figs, and apples. 3/Apples, apricots, avocados, blueberries, cherries, grapes, grapefruit, kiwifruit, lemons, melons, nectarines, oranges, pears, plums, peaches, raspberries, strawberries, and tangerines. 4/Strawberries, blueberries, apples, cherries, plums, raspberries, and blackberries. 5/Asparagus, beans, carrots, corn, peas, tomatoes, and tomato paste. 6/Beans, broccoli, carrots, corn, spinach, onions, peppers, mushrooms, and zucchini, including combinations thereof. 7/Almonds, pecans, pistachios, walnuts, and hazelnuts. 8/Cocktail, peaches, pears, and tart cherries.

**FY 1998 GSM-102  
SUPPLIER CREDIT COVERAGE 1/**

<b>Country/Commodity</b>	<b>Announced Allocation (In Millions of Dollars)</b>	<b>Exporter Applications Received (In Millions of Dollars)</b>	<b>Balance (In Millions of Dollars)</b>
<b>ANDEAN REGION</b>	<b>10.0</b>	<b>0.0</b>	<b>10.0</b>
Canned fruit 2/		0.0	
Dried fruit 3/		0.0	
Fresh fruit 4/		0.0	
Tree nuts 5/		0.0	
Potatoes		0.0	
Canned vegetables 6/		0.0	
Frozen vegetables 8/		0.0	
Fresh vegetables 7/		0.0	
Wine and brandy		0.0	
<b>ARGENTINA</b>	<b>3.0</b>	<b>0.0</b>	<b>3.0</b>
Tree nuts 5/		0.0	
Fresh fruit 4/		0.0	
Canned fruit 2/		0.0	
Dried fruit 3/		0.0	
Wine and brandy		0.0	
Frozen vegetables 7/		0.0	
Potatoes		0.0	
Canned vegetables 6/		0.0	
<b>BALTIC REGION</b>	<b>5.0</b>	<b>0.0</b>	<b>5.0</b>
Dried fruit 3/		0.0	
Fresh fruit 4/		0.0	
Frozen fruit 9/		0.0	
Canned fruit 2/		0.0	
Frozen vegetables 8/		0.0	
Tree nuts 5/		0.0	
Potatoes		0.0	
Wine and brandy		0.0	
<b>BRAZIL</b>	<b>10.0</b>	<b>0.0</b>	<b>10.0</b>
Canned fruit 2/		0.0	
Dried fruit 3/		0.0	
Fresh fruit 4/		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
Canned vegetables 6/		0.0	
Fresh vegetables 7/		0.0	
Wine and brandy		0.0	
<b>CENTRAL AMERICA</b>	<b>5.0</b>	<b>0.0</b>	<b>5.0</b>
Fresh fruit 4/		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
Dried fruit 3/		0.0	
Canned fruit 2/		0.0	
Fresh vegetables 7/		0.0	
Wine; brandy; beer		0.0	



**FY 1998 GSM-102  
SUPPLIER CREDIT COVERAGE 1/**

<b>Country/Commodity</b>	<b>Announced Allocation (In Millions of Dollars)</b>	<b>Exporter Applications Received (In Millions of Dollars)</b>	<b>Balance (In Millions of Dollars)</b>
<b>CENTRAL EUROPE</b>	<b>20.0</b>	<b>0.0</b>	<b>20.0</b>
Fresh fruit 4/		0.0	
Tree nuts 5/		0.0	
<b>ISRAEL</b>	<b>20.0</b>	<b>0.0</b>	<b>20.0</b>
Tree nuts 5/		0.0	
Fresh fruit 4/		0.0	
Dried fruit 3/		0.0	
Wine and brandy		0.0	
<b>JAMAICA</b>	<b>5.0</b>	<b>0.0</b>	<b>5.0</b>
Dried fruit 3/		0.0	
Fresh fruit 3/		0.0	
Fresh vegetables 7/		0.0	
Canned fruit 2/		0.0	
Frozen vegetables 8/		0.0	
Tree nuts 5/		0.0	
Potatoes		0.0	
Wine and brandy		0.0	
<b>KAZAKSTAN</b>	<b>5.0</b>	<b>0.0</b>	<b>5.0</b>
Canned fruit 2/		0.0	
Frozen vegetables 8/		0.0	
Frozen fruit 9/		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
Canned vegetables 6/		0.0	
Wine and brandy		0.0	
<b>MEXICO</b>	<b>20.0</b>	<b>0.0</b>	<b>20.0</b>
Fresh fruit 4/		0.0	
Fresh vegetables 7/		0.0	
Canned fruit 2/		0.0	
Canned vegetables 8/		0.0	
Frozen vegetables 8/		0.0	
Wine and brandy		0.0	
Dried fruit 3/		0.0	
Tree nuts 5/		0.0	
Potatoes		0.0	
<b>POLAND</b>	<b>10.0</b>	<b>0.0</b>	<b>10.0</b>
Canned fruit 2/		0.0	
Canned vegetables 6/		0.0	
Dried fruit 3/		0.0	
Frozen orange juice concentrate		0.0	
Potatoes		0.0	

**FY 1998 GSM-102  
SUPPLIER CREDIT COVERAGE 1/**

<b>Country/Commodity</b>	<b>Announced Allocation (In Millions of Dollars)</b>	<b>Exporter Applications Received (In Millions of Dollars)</b>	<b>Balance (In Millions of Dollars)</b>
<b>SOUTHEAST ASIA</b>	<b>35.0</b>	<b>0.0</b>	<b>35.0</b>
Canned fruit 2/		0.0	
Canned vegetables 6/		0.0	
Dried fruit 3/		0.0	
Fresh fruit 4/		0.0	
Fresh vegetables 7/		0.0	
Frozen fruit 9/		0.0	
Tree nuts 5/		0.0	
Wine and brandy		0.0	
Potatoes		0.0	
<b>TURKEY</b>	<b>10.0</b>	<b>0.0</b>	<b>10.0</b>
Canned fruit 2/		0.0	
Dried fruit 3/		0.0	
Frozen orange juice concentrate		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
Canned vegetables 6/		0.0	

1/Coverage is detailed in FAS Program Announcements for all commodities, including those not listed as of January 2, 1998. FAS news releases are available on the Internet at <http://www.fas.usda.gov>. 2/ Cocktail, peaches, pears, and tart cherries. 3/ Dates, figs, prunes, and raisins. 4/ Apples, apricots, avocados, blueberries, cherries, grapes, grapefruit, kiwi, lemons, melons, nectarines, oranges, pears, plums, peaches, raspberries, strawberries, and tangerines. 5/ Almonds, pecans, pistachios, walnuts, and hazelnuts. 6/ Asparagus, beans, carrots, corn, peas, tomatoes, and tomato paste. 7/ Asparagus, beans, broccoli, carrots, cauliflower, celery, corn, garlic, lettuce, onions, peppers, potatoes, and tomatoes. 8/ Beans, broccoli, carrots, corn, mushrooms, onions, peppers, spinach, and zucchini, including combinations thereof. 9/ Blackberries, blueberries, raspberries, and strawberries.

## **EXPORT NEWS AND OPPORTUNITIES**

### **USDA Announces New Facility Guarantee Program**

On December 3, 1997, the United States Department of Agriculture (USDA) issued five program announcements authorizing \$150 million in credit guarantees for export sales of U.S. capital goods and services to improve existing agriculture-related facilities in 12 emerging markets. USDA allocated \$20 million to the Caribbean Region (Jamaica and Trinidad and Tobago); \$30 million to the Central America Region (Costa Rica, El Salvador, Guatemala, Panama); \$50 million to Mexico; \$10 million to Peru; and \$40 million to the Southeast Asia Region (Indonesia, Malaysia, Philippines, and Thailand).

The FGP is a new export program that will assist U.S. producers by expanding markets overseas for U.S. agricultural commodities and product. For example, in some markets U.S. agricultural exports are restricted by inadequate infrastructure. The FGP provides credit guarantees for capital goods and services to assist in an emerging market in developing infrastructure that also benefits U.S. agricultural exports. The FGP credit guarantees may be used to increase the storage capacity of cold storage facilities that primarily refrigerate U.S. fruits and vegetables in other countries. By supporting such facilities, the FGP is designed to enhance sales of U.S. agricultural commodities and products to emerging markets where the demand for such commodities and products may be constricted due to inadequate storage, processing, or handling capabilities for horticultural products.

USDA will consider requests to program countries not covered under the announcements where the country is eligible to participate in the Export Credit Guarantee Program (GSM-102) and where an exporter has evidence to suggest that the FGP would primarily benefit U.S. agricultural exports.

Information on the FGP is available on the Internet at <http://www.fas.usda.gov/excredits/facility.html>.

(For further information on the FGP for horticultural commodities, contact Yvette Wedderburn Bomersheim, 202-720-9903).

## **WORLD TRADE SITUATION AND POLICY UPDATES**

### **First shipment of U.S. apples lands in Chile**

In the wake of a recently concluded phytosanitary protocol, the first 43 boxes of Washington State Red and Golden Delicious apples arrived in Santiago on December 4. Following a temporary delay at port, due to a quarantine-related concern, the apples were released just in time for Secretary Glickman to take part in the welcoming ceremony and reception. The bulk of the 43 carton shipment was subsequently delivered to Jumbo Supermarket, the largest supermarket chain in Santiago. The public acceptance was reported to be excellent, with favorable accompanying media coverage.

During bilateral consultations held October 1-2 in Washington, DC, Chile agreed to recognize 26 counties in California and 11 counties in Washington State as being free from apple maggot, Chile's major pest of concern. A 1994 GAO report placed Chile's potential as a market for U.S. fresh fruits at \$16 million annually. U.S. apple sales to Chile could eventually reach \$4 million per year.

### **FDA bans Guatemala raspberry imports into the United States**

The Food and Drug Administration (FDA) announced on December 8 that it was banning imports of Guatemala raspberries, beginning with the upcoming 1998 season, due to continued concerns over the protozoan

parasite, cyclospora. This parasite is believed to have caused the outbreaks of illness in the United States and Canada in 1996 and 1997. Most of these are thought to have been associated with the consumption of fresh raspberries from Guatemala.

The FDA is working with the Guatemalan raspberry growers to determine how and where the parasite may have contaminated the raspberries. The raspberries may have been contaminated by poor water supplies. It has not yet been determined when or if raspberries from Guatemala will again be permitted entry into United States. U.S. raspberry producers have not reported problems with the parasite; however they remain concerned over the negative image the product may develop because of the Guatemala problem.

Annual U.S. imports of fresh raspberries in the two most recent fiscal years were valued at more than \$13 million, with shipments from Guatemala accounting for approximately 4 percent of that total. Canada and Chile remain the dominant suppliers.

#### **European Union extends wine derogations to allow U.S. wine trade to continue**

The European Union (EU) Agricultural Ministers extended the U.S./EU Wine Accord until the end of 1998 at the December Council meeting. The terms of U.S.-EU wine trade are governed by the 1983 Wine Accord, which expired in 1993. Under the 1983 Accord, the United States obtained temporary derogations from EU restrictions on certain enological (wine-making) practices and from certain cumbersome certification procedures. Since the Accord expired, the EU has extended these derogations several times; the United States' main concern is to make permanent the temporary derogations allowed in the 1983 Accord. Representatives from the EU and the United States are tentatively scheduled to meet in Barcelona, Spain on January 27 and 28 for further discussion on U.S.-EU wine trade issues. The EU is an important market for U.S. wine and wine products, accounting for approximately 45 percent of total exports. Exports to the EU reached \$174 million for the

period January through October 1997, up 34 percent over the same period of the previous year.

#### **USDA seeks access to Argentina for Florida citrus; Argentine technical team visits in January**

USDA (APHIS & FAS) has been pursuing for a number of years the lifting of Argentina's existing phytosanitary-based ban on Florida citrus. Most recently, Secretary Glickman raised the issue with his counterpart during a December 2-3 visit to Argentina. Argentina's Agriculture Secretary responded by pledging to address the issue in a timely fashion. Subsequently, the two sides arranged for a 2-person team of Argentine plant quarantine officials to travel to Florida the week of January 26 to visit the citrus production region and observe quarantine measures relating to citrus canker and the Caribbean fruit fly. This activity is being funded under the FAS Emerging Market Office's Technical Issue Resolution Fund.

Argentina is presently a modest, but growing market for U.S. fresh fruit. Exports of all fresh fruits from the United States to this country in FY1997 were valued at \$2.3 million. Given Florida's leading position as a producer and exporter of high quality grapefruit, it is estimated that shipments could reach \$1 million annually in the near term were that state to achieve access the Argentine market.

#### **U.S. exporters of horticultural products to benefit from accelerated Philippine duty reductions**

The Philippine Government has implemented tariff cuts, effective in 1998, on a range of horticultural and other agriculture products, according to a report from the U.S. Agricultural Counselor in Manila. These cuts essentially represent an acceleration of previously agreed to tariff reduction commitments. Although the reductions will not completely offset the depreciation of the peso against the U.S. dollar which has occurred since July, they will be helpful to U.S. exports over the longer term.



Duties on tree nuts and raisins were cut from 10 percent to 3 percent, while the tariffs on frozen potatoes and grape and apple juice were cut from 20 percent to 10 percent. The Philippines has been a rapidly expanding market for U.S. horticultural commodities, with shipments through the first 11 months of 1997 valued at nearly \$113 million, up 4 percent from the previous year.

#### **SECOFI holds final public hearing on apple antidumping issue**

As part of the ongoing antidumping investigation on apples from the United States, Mexico's Secretariat of Commerce and Industrial Development (SECOFI) held a public hearing on Wednesday, January 14 in Mexico City. The purpose of the hearing was to receive testimony from domestic producers, exporters, and importers on the extent to which any alleged dumping may have caused economic injury to Mexico's apple industry. Representatives from the U.S. apple industry participated fully in the public hearing. The hearing concludes the evidence gathering phase of SECOFI'S antidumping investigation. A final determination in this case is expected by late February or early March. In the meantime, the 101.1 percent temporary antidumping duty imposed by Mexico on U.S. apple imports back on September 1, 1997 remains in effect. The extremely high duty has significantly limited sales to what had been a leading export market for Pacific Northwest apples, shipments of which were valued at \$46.5 million in FY97.

SECOFI initiated on March 6, 1997 an antidumping investigation of U.S. Red and Golden Delicious apple imports. The investigation was in response to a petition filed by the Chihuahua State Fruit Growers Association, which alleges that U.S. apple imports were being sold below their cost of production, thus damaging Mexican apple producers. The period of time under investigation was from January 1-June 30, 1996.

## U.S. Organic Proposed Regulation Published

On December 16, 1997, the proposed regulation to establish a National Organic Program (NOP) was published in the Federal Register. The 90-day public comment period closes on March 16, 1998. The comprehensive regulation covers crop and livestock/livestock product production, handling, and marketing; a National List of banned and approved substances; labeling; certification of farm operations and handlers; USDA accreditation of State and private certifiers; and other administrative functions, including determination of the equivalency of imported organic foods. When fully implemented, the NOP is expected to stimulate increased production, consumption and international trade in this small but fast-growing sector.

### Background

Although production and marketing of "organic" agricultural products began at least four decades ago, those involved in the organic movement have varied in practices and philosophies. Over time, as production grew in response to rising demand, producers and processors of organic products recognized the importance of reaching a consensus about what the term "organic" means.

In the late 1980's the organic industry turned to Congress for help in developing national organic standards. Support for the legislation came from all industry segments because each had experienced problems it believed could be addressed through uniform standards. A bill to create a national organic program was introduced in 1989, and later passed as part of the 1990 Farm Bill. The legislation is known as the Organic Foods Production Act (OFPA) of 1990.

The OFPA directed the Secretary of Agriculture (Secretary) to establish a National Organic Program (NOP). Lead responsibility for developing and implementing the program was assigned to USDA's Agricultural Marketing Service (AMS). The OFPA has three purposes: (1) to establish national standards governing the marketing of certain agricultural products as organically produced; (2) to assure consumers that organically produced foods meet a consistent standard; and (3) to facilitate

interstate commerce in fresh and processed food that is organically produced.

The comprehensive regulation, published in the Federal Register on December 16, 1997, contains detailed requirements and guidelines for the production and handling of organic agricultural products, both crops and livestock. A National List of banned and approved substances; labeling; certification of farm operations and handlers; USDA accreditation of State and private certifiers; and other administrative functions, including determination of the equivalency of imported organic foods, also are covered in the regulation. The public comment period ends on March 16, 1998. (*See page 24 for details about how to obtain a copy of the regulation and submit comments.*)

### Industry and Consumers Helped Shape Regulations

OFPA mandated establishment of a National Organic Standards Board (NOSB) to advise the Secretary on a host of issues relating to the NOP. To ensure representation of a broad range of interests, the OFPA specified that the 14-member board include four organic producers, two organic handlers/processors, one organic retailer, three environmentalists, three consumer advocates, and one scientist. A fifteenth member, an accredited certifier, will join the NOSB once the NOP is fully operational. NOSB members are appointed by

the Secretary for 5-year terms.

Based on position papers, public and industry input, and after an extensive review and comment process, the NOSB made formal recommendations to the Secretary, many of which are reflected in the proposed regulation. AMS also reviewed existing State and private certification programs and international organic standards, and worked closely with other Federal agencies such as EPA, FDA, HHS and SBA, as they developed the proposed regulation.

### What "Organic" Means Now

According to industry estimates, sales of organic food in the United States reached \$3.5 billion in 1996, the seventh consecutive year in which the growth rate exceeded 20 percent. Although still small compared to the conventional food market, organic products are increasingly going mainstream. Recently, full-size natural foods supermarkets have sprung up across the country, conceivably able to offer an organic version of nearly every conventional food.

However, at this time, the term "organic" is not applied consistently, as 12 states and more than 30 private entities operate organic certification programs. Although the requirements of most U.S. organic certifiers are similar, there are sometimes fundamental differences. Further, not all producers who identify themselves as organic are certified, and at this time, they don't necessarily *have* to be certified to make that claim.

Right now, about 30 states have labeling laws governing use of the term "organic," but exactly what those laws cover varies considerably. Some states regulate *only* what is produced in their own state while others cover *all* organically grown products marketed within their borders. Some states require that *all* products sold as organically produced be certified, whereas others specify that *only* those products produced in the state be certified. Some states limit the range of

categories of products that can display an organic label.

Currently, producers in all states are prohibited from labeling meat and poultry as organic, whereas dairy products and eggs can be labeled and sold as such now.

### What "Organic" Will Mean Under NOP

The proposed regulation applies to all "agricultural products," a term defined as *"any agricultural commodity or product, whether raw or processed, including any commodity or product derived from livestock that is marketed in the United States for human or livestock consumption."* Thus the term "organic" can apply to any food, including meat and poultry, and fiber. It also covers wild crops, and pasture and rangeland grazed by organic livestock.

The proposed regulation defines organic farming and handling as *"A system designed and managed to produce agricultural products by the use of methods and substances that maintain the integrity of organic agricultural products until they reach the consumer. This is accomplished by using, where possible, cultural, biological and mechanical methods, as opposed to using substances, to maintain long-term soil fertility; increase soil biological activity; ensure effective pest management, recycle wastes to return nutrients to the land; provide attentive care for farm animals; and handle the agricultural products without the use of extraneous synthetic additives or processing..."*

Thus, the term "organic" describes a food or fiber that has been produced and handled under the process detailed in the proposed regulation. Because one cannot tell by visual inspection if a product is organic, certification by an accredited third party is central to the concept of organics, providing assurance that organic integrity has been maintained from farm to retail outlet. "Organic" on the label does not imply or guarantee superiority of quality, nutritional value, taste, purity, or safety.



## Organics In the International Market

Organic production is growing worldwide. Attracted by higher prices, many developing countries are exploring organics as a way to boost farmer income and access new markets. Many western European governments provide subsidies and other incentives to encourage their producers to make the transition from conventional to organic agriculture, and some actively encourage consumers to buy organic.

Today, organic products have a higher profile in international trade than ever before, and the organic sector is expected to remain among the fastest-growing areas of agriculture. Although small compared to conventional agriculture, the international organics sector has attracted attention recently because of its premium prices, rapid growth rate and potential to expand beyond a niche market in some areas of the world.

Currently, our biggest markets for organically produced commodities and products are the European Union (EU) countries, Canada and Japan. Major exports to the EU and Canada include dried fruit and nuts, wheat, flour, beans, lentils, rice, breakfast cereals and processed and convenience foods. The main exports items to Japan consist of fresh and dried fruit, fresh vegetables, and nuts.

Although detailed production and trade statistics are not available, industry sources estimated that in 1994, the value of U.S. organic exports topped \$200 million, and anecdotal evidence indicates annual growth rates since then have been in the double digits. According to one source, the EU organic food market was valued at \$1.7 billion in 1990 and may reach \$14 billion by the year 2000. In fact, by 1995, with sales up 25 percent per year, the organic food market in France and Germany alone--the two largest countries in the EU--reached \$2 billion. In 1996 the size of the organic food market in Japan was estimated at \$500 million.

## NOP Will Affect the U.S. Organic Sector

Once the NOP is fully implemented, the term "organic," as applied to U.S.-produced agricultural products, will mean the same thing to everyone. Full implementation of the NOP is expected to serve as a catalyst for further expansion of the U.S. organic sector and stimulate additional growth in international trade.

According to analysis done by the USDA, *"consumers will benefit from greater confidence in the organic label, a wider selection of organic products, and the potential for lower prices as markets expand and become more efficient. Producers will benefit from increased assurance in the quality of certification, protection from fraudulently labeled products, access to international markets, the ability to market organic meat and poultry as organic, and the economies of scale and production efficiencies that may accompany market expansion."* (For further details, see ERS's *Food Review*, Vol. 20, Issue 2, November 1997).

## Equivalency of Imported Foods

From an import standpoint, the proposed regulation requires that products imported into the United States may be labeled as organic only if they have been produced, handled, and certified by a foreign organic program that the USDA has determined is equivalent to the NOP.

This issue is especially important to U.S. producers and processors who source products or ingredients, mainly from Latin America, which either are unavailable year-round or not grown in the United States. At least some of these commodities are converted into high-value, processed products and exported to our overseas customers. Thus, an efficient procedure to assess organic standards of other nations for equivalency to the U.S. standards will be in the best interest of both the domestic and export markets.



## Controversial Issues

As the regulation developed, several controversial issues emerged regarding their compatibility with the concept of organics, and which must be resolved before a final rule is published. Those issues include use of genetically engineered organisms (GEOs) and irradiation, municipal sludge (biosolids) and raw manure on cropland, antibiotics for livestock, synthetic ingredients in processed foods, and allowable pesticide residue levels.

The proposed rule generated extensive media coverage upon release. All three major TV networks carried news stories on December 15, 1997, the day the Secretary announced the NOP. In the days immediately following release of the proposed regulation, major newspapers across the country ran articles and/or editorials and the major wire services carried news stories. Coverage focused on GEOs, irradiation and municipal sludge, as well as other perceived shortcomings of the regulation expressed by members of the organic industry, consumer groups and other interested parties.

The OFPA was silent on GEOs and irradiation, and the proposed regulation takes no position but instead specifically requests comments about the appropriateness of these technologies in the production and handling of organic foods. The OFPA addressed the other issues listed to some extent, and the proposed rule seeks comments to help iron out the details. Although all of these issues have been or are now being resolved for conventional agriculture, the public comment period will serve as a forum for discussions of whether they have a place in the U.S. organic farming and handling system.

## Implications for U.S. Exports

As more foreign governments develop or revise their own organic laws and regulations, the issue of equivalency with the standards of major U.S. export markets will become increasingly important to our competitiveness. For instance, U.S. exports of organically

produced commodities and products now are admitted into the EU on a case-by-case (lot-by-lot) basis which involves time, paperwork and frustration for U.S. producers and exporters, enough to keep some of them out of that market. If, after a formal review, the final NOP is deemed equivalent to the EU's organic standards, U.S. exports to the EU will be expedited and should increase.

However, it is uncertain how some of our major trading partners, particularly the EU, will react if the final regulation allows some of the controversial technologies and practices previously discussed to be used in the U.S. organic production and handling system. The ongoing controversy over GEOs in conventional agricultural products destined for the EU market is one example of the sensitivity of this issue. At stake is the U.S. share of this growing high-value market.

## Conclusion

The long-awaited proposed organic regulation published on December 16, 1997, will generate intense discussion, both here and abroad, about what the term 'organic' will mean in the United States. If predictions hold, organic production will increase to meet rising demand in both the domestic and international markets when the NOP is fully implemented. To the extent the final regulation reflects equivalency in the laws, regulations and standards of our major trading partners, the United States will be in an excellent position to participate fully in the international market for organically produced commodities and processed products. Resolving these issues once the public comment period closes will present an important and crucial challenge to USDA.

*(For further information, contact Janise Zygmunt (analysis) at 202-720-1176 or Kelly Strzelecki (marketing) at 202-720-1341.)*

The public comment period on the U.S. Organic proposed regulation ends March 16, 1998. Comments may be submitted in writing, by FAX or via Internet. Send written comments to Eileen S. Stommes, Deputy Administrator, Agricultural Marketing Service, USDA, Room 4007-S, Ag Stop 0275, P.O. Box 96456, Washington, DC 20090-6456 or FAX to (202) 690-4632. Access USDA's NOP website to submit your comments electronically: <http://www.ams.usda.gov/nop>

Copies of the proposed rule can be obtained for \$8 from the Federal Register by calling (202) 512-1800, from some U.S. Government Bookstores, or by calling the U.S. Government Printing Office (202-653-5075). The entire regulation, the schedule of public information sessions on the proposed rule to be held around the country during the comment period, and other information relating to the NOP, can also be found at USDA's NOP website.

## Processed Tomato Products Situation and Outlook in Selected Countries

Unfavorable weather and low market prices caused a reduction in output of processing tomatoes in selected countries. Stocks in most of the exporting countries are becoming burdensome and processors have lowered prices in an effort to remain competitive and maintain export market share. Mirroring this situation, canned tomato and tomato paste production in selected countries in 1997/98 are forecast at 1.6 and 1.2 million metric tons, down 1 and 8 percent respectively from an earlier forecasts, and down 22 and 17 percent below the previous season. Selected country tomato paste and canned tomato export forecasts for 1997/98 have been reduced 6 and 8 percent, respectively, from earlier forecasts, and are 8 and 5 percent respectively below the previous season's volume. U.S. tomato paste exports are also expected to decrease in 1997/98. However, U.S. tomato paste exports in marketing year (July-June) 1996/97 reached a record 129,000 tons, up 47 percent over the previous marketing year's total. Record exports to Brazil accounted for most of this increase.

Table 1: Production of Processing Tomatoes in Selected Countries

Country	1993	1994	1995	1996	1997
----1,000 Metric tons----					
North America					
United States	8,778	10,471	10,230	10,350	9,047
Mexico	340	350	200	310	250
Total	9,118	10,821	10,430	10,660	9,297
South America					
Brazil	670	878	930	680	1,000
Chile	611	745	902	1,000	823
Total	1,281	1,623	1,832	1,680	1,823
Western Mediterranean					
Italy	3,500	3,500	3,450	4,150	3,450
Greece	1,056 1/	1,145 2/	1,200	1,340	1,180
Spain	894	1,211	907	1,254	989
Portugal	501	865	831	905	780
France	238	277	287	284	285
Total	6,189	6,998	6,675	7,933	6,684
Eastern Mediterranean					
Turkey	1,050	1,225	2,080	1,850	1,080
Israel	205	254	315	256	220
Total	1,255	1,479	2,395	2,106	1,920
Total Mediterranean	7,444	8,477	9,070	10,039	8,604
Grand Total	17,843	20,921	21,332	22,379	19,724

1/ Includes approximately 30,000 tons diverted to the fresh market. 2/ Includes approximately 20,000 tons diverted to the fresh market. Source: Horticultural and Tropical Products Division, FAS, USDA.

## Processed Tomato Production Summary

The production estimate for processing tomatoes in 11 major producing countries in 1997 is 19.7 million metric tons, down 12 percent from 1996, due mainly to lower prices, high product carryover stocks and bad weather in the Eastern Mediterranean region: Italy, Greece and Turkey. The overall impact of this decline was somewhat offset by a 47 percent increase in Brazil's production, and a minimal increase in France. All other selected producing countries registered moderate to significant declines.

### Western Hemisphere

Final estimates for production of tomatoes for processing in the **United States** under contract in 1997 were 9.05 million tons, down 3 percent from an earlier forecast, and 13 percent from the previous year. This decline was due largely to process growers reducing acreage because of poor market prices for tomato products over the past year, and record carryover stocks resulting from large packs in the last few years.

In marketing year 1996/97, U.S. exports of tomato products-- canned tomatoes, tomato paste, tomato sauce and ketchup totaled 292,000 tons, valued at \$229 million, up 24 percent in volume and 16 percent in value from the same period a year earlier.

U.S. imports of processed tomato products in 1996/97 totaled 111,000 tons, down 4 percent from the previous year, due mainly to reduced imports of tomato paste and puree from Canada and Mexico. Although overall imports of tomato products were down in 1996/97, imports of canned tomatoes from the EU, mainly Italy, were up dramatically to 51,000 tons from 26,000 tons in 1995/96, following the U.S. elimination of the 100 percent punitive duty on Italian canned tomatoes.

In **Mexico**, production of tomatoes for processing in 1997/98 has been increased from 200,000 to 250,000 tons, but is down 19 percent from the 1996/97 level. The upward revision for 1997/98 is attributed mainly to a greater availability of fresh tomatoes and an increase in export demand for

tomato paste. Most processing tomato plants in Mexico operate from March to June.

Mexico's tomato paste production and export forecasts have been increased for 1997/98 due to the greater availability of fresh tomatoes.

In **Brazil**, production of tomatoes for processing in 1997 is estimated 1.0 million tons, unchanged from the previous estimate, but up 47 percent from 1996, due mainly to an increase in harvested area and greater demand for processed tomato products.

In Brazil, about 70 to 75 percent of processing tomatoes go into tomato paste and extracts. The majority of the paste is used in further processing into consumer-ready sauces and other such products. Production of tomato paste in Brazil in 1997 has been reduced from 107,000 tons to 102,000 tons, down 5 percent from 1996, due mostly to increased domestic consumption of tomatoes.

Brazil's tomato paste export forecast for 1997/98 has been reduced from 22,500 tons to 9,753 tons because of increased domestic demand.

In **Chile**, production of tomatoes for processing in 1997 has been revised downward from 886,000 tons to 823,000 tons. The decline in production was largely due to severe drought in the major producing regions (La Serena and Talca). Industry sources estimate that Chile's production of tomatoes for processing in 1998 will decline approximately 10 percent, due to excessive rains and wind since last August which made it difficult for producers to establish good seedbeds. As a result, a high percentage of plants were lost and had to be replanted.

Chile's canned tomato production forecast for 1997/98 was reduced from 27,000 tons to 6,400 tons because of fewer tomatoes available for processing. Chile's canned tomato export forecast was accordingly reduced from 23,300 tons to 9,500 tons.



## **Mediterranean Area**

Production of tomatoes for processing in 1997 in major producing countries in the European Union (EU) remained unchanged from an earlier forecast of 7.16 million tons, down 9 percent from 1996. For additional details on the EU minimum grower prices and processing aids to canners for tomato products see the FHORT July 1997 circular report.

In **Italy**, production of tomatoes for processing in 1997 has been reduced from 3.5 million tons to 3.45 million tons, due to a decline in planted area, a severe frost last spring and drought in the summer (1997), which affected the entire Italian tomato crop. Apulia, located in Southeastern Italy, accounts for approximately 60 percent of the Italian processing tomato output.

Production of canned tomatoes in 1997/98 is forecast at 1.35 million tons, unchanged from an earlier forecast, but down 24 percent from 1996/97. The canned tomato exports in 1997/98 are expected to approximate the previous year's level as stocks are expected to be drawn down. The tomato paste production forecast for 1997/98 was reduced by 3 percent to 290,000 tons, 21 percent below last year. The tomato paste export forecast for 1997/98 was reduced by 15 percent to 226,000 tons.

In **Portugal**, production of tomatoes for processing has been revised downward from 910,000 tons to 780,000 tons. This decline is due largely to reduced yields caused by heavy rains during the planting season. The crop was also affected by mildew, and the effectiveness of chemical controls for pests was limited by rains. In 1997, tomato paste production, which accounts for the bulk of Portugal's processed production, is estimated at 130,000 tons, down 13 percent from an earlier forecast and down 20 percent from the previous year.

Portugal's 1997/98 tomato paste exports are forecast at 125,000 tons, up 11 percent from the previous forecast due mainly to increased demand in key overseas markets. In 1996/97, EU countries accounted for 85 percent of Portugal's total tomato paste exports.

In **Greece**, production of tomatoes for processing in

1997 is estimated at 1.18 million tons, up 5 percent from an earlier forecast, but down 13 percent from 1996. Late spring frosts and hail were the primary factors for the decline. Approximately 95 percent of the total crop is used for tomato paste.

Tomato paste exports in 1997/98 are forecast 220,000 tons, up 19 percent from an earlier forecast, because of more fresh tomatoes being delivered to processors.

In **Spain**, production of tomatoes for processing in 1997 is estimated at 1.1 million tons, down 10 percent from an earlier forecast and down 21 percent from the previous year. Heavy rains in the beginning of summer in all tomato producing areas are the primary reason for the decline.

Canned tomato production in 1997 in Spain is forecast at 200,500 tons, down 9 percent from the previous year. Because lower production is expected, a significant draw down in product stocks and lower exports are anticipated in order to maintain a relatively stable consumption level. Exports of canned tomatoes for the same period have been lowered to 35,000 tons from 50,000 tons forecast earlier, because of reduced deliveries of fresh tomatoes to processors.

Tomato paste production in 1997 is forecast at 131,000 tons, 13 percent above the earlier forecast. Increased deliveries of tomatoes to processors is the main reason for this revision. Tomato paste exports in 1997/98 are forecast at 48,000 tons, up 7 percent from the earlier forecast.

In **Turkey**, production of tomatoes for processing in 1997 has been reduced from 1.7 million tons to 1.1 million tons, down 39 percent from the previous year. The downswing in production is due to heavy rains and cool weather in August in the main growing region (Marmara) that caused a variety of problems, including reduced yields, mildew and leaf moth. However, suitable weather in other growing areas extended the harvest, which helped to boost production.

Because of the reduced tomato production, tomato paste production in Turkey in 1997/98 is now forecast at 180,000 tons, 35 percent below the

previous forecast and 38 percent below the previous year's output. Turkey's annual tomato paste production capacity is 375,000 tons, the second largest in Europe after Italy with 400,000 tons capacity.

The shortage of tomatoes in Turkey in 1997/98 has caused cancellation of numerous export contracts, particularly at the quality end of the market. Turkey's tomato paste export forecast for 1997/98 has been reduced from 190,000 tons to 115,000 tons, because of this year's production shortfalls. Reportedly, the shortage has pushed export prices of tomato paste to US\$1,000 per ton (28-30 percent TSS basis), compared to US\$700 per ton last year.

In **France**, production of processing tomatoes in 1997 has been reduced from 295,000 tons to 285,000 tons, up slightly from the revised 1996 production. This decline reflects a reduction in total area harvested. Production of tomato paste in 1997/98 has been reduced from 37,500 tons to 34,000 tons, due mainly to lower deliveries of fresh tomatoes to processors than expected. Tomato paste production is expected to remain stable at about the current level in 1998. Production of canned tomatoes in 1997/98 was increased from 30,000 tons to 36,400 tons, because deliveries of fresh tomatoes to processors were higher than expected.

In **Israel**, production of processing tomatoes in 1997 is estimated at 220,000 tons, down 14 percent from 1996, due to additional closings of processing plants resulting from low profits and weak international prices for tomato products.

In Israel, canned processing products include: whole and diced peeled tomatoes, tomato paste and puree, tomato juice, ketchup and pizza sauces. Most Israeli tomato processors produce the whole range of tomato products.

*For information on production, please contact Emanuel McNeil at (202) 720-2083, and on trade contact Steve Shnitzler at (202) 720-8495.*

Table 2: Canned Tomatoes <sup>1/</sup> Production, Supply, and Distribution in Selected Countries

Marketing Year <sup>2/</sup>	Beginning Stock	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stock
----Metric tons, net weight----							
France							
1995/96	15,118	30,000	84,837	129,955	5,611	120,000	4,344
1996/97	4,344	28,800	96,258	129,402	3,652	120,000	5,750
1997/98	5,750	36,400	88,000	130,150	5,000	120,000	5,150
Greece							
1995/96	3,345	25,230	11,410	39,985	10,496	28,000	1,489
1996/97	1,489	25,490	13,000	39,979	11,000	28,000	979
1997/98	979	26,100	13,000	40,079	11,000	28,000	1,079
Italy							
1995/96	125,000	1,359,000	6,000	1,490,000	683,000	807,000	0
1996/97	0	1,768,000	7,000	1,775,000	681,000	840,000	254,000
1997/98	254,000	1,350,000	7,000	1,611,000	680,000	840,000	91,000
Spain							
1995/96	45,000	209,000	3,500	257,500	57,500	174,000	26,000
1996/97	26,000	220,800	160	246,960	67,300	175,000	4,660
1997/98	4,660	200,500	500	205,660	35,000	170,000	660
Brazil							
1995/96	0	1,000	8,505	9,505	0	7,910	1,595
1996/97	1,595	2,655	3,700	7,950	0	7,950	0
1997/98	0	1,200	8,307	9,507	131	8,750	626
Chile							
1995/96	1,169	30,350	0	31,519	27,336	3,250	933
1996/97	933	24,780	0	25,713	13,038	3,300	9,375
1997/98	9,375	6,400	0	15,775	9,500	3,300	2,975
Total							
1995/96	189,632	1,654,580	114,252	1,958,464	783,943	1,140,160	34,361
1996/97	34,361	2,070,525	120,118	2,225,004	775,990	1,174,250	274,764
1997/98	274,764	1,620,600	116,807	2,012,171	740,631	1,170,050	101,490

Source: U.S. Agricultural Attache Reports. 1/ Includes whole peeled, and/or wedged, diced, crushed, and other non-concentrated products. 2/ Marketing Years are July-June with the exception of France's which is August-July, and Brazil's which is May-April. Note: For calendar year reference, MY 1995/96 would become CY1995.

Table 3: Tomato Paste Production, Supply, And Distribution In Selected Countries

Marketing Year <sup>1/</sup>	Beginning Stock	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stock
----Metric tons, net weight 2/----							
France							
1995/96	3,268	37,000	49,001	89,269	3,955	82,000	3,314
1996/97	3,314	37,000	45,373	85,687	4,538	80,000	1,149
1997/98	1,149	33,900	50,000	85,049	3,500	80,000	1,549
Greece							
1995/96	16,059	198,608	1,919	216,586	144,779	12,000	59,807
1996/97	59,807	234,000	1,000	294,807	230,000	13,000	51,807
1997/98	51,807	204,500	1,000	257,307	220,000	13,000	24,307
Italy							
1995/96	10,000	300,000	88,000	398,000	253,000	100,000	45,000
1996/97	45,000	368,000	65,000	478,000	226,000	150,000	102,000
1997/98	102,000	290,000	65,000	457,000	226,000	150,000	81,000
Portugal							
1995/96	2,572	145,585	0	148,157	105,468	41,689	1,000
1996/97	1,000	162,832	0	163,832	112,459	25,832	25,541
1997/98	25,541	130,000	0	155,541	125,000	25,541	5,000
Spain							
1995/96	20,000	102,000	5,000	127,000	36,000	82,000	9,000
1996/97	9,000	144,500	12,000	165,500	39,100	85,600	40,800
1997/98	40,800	131,000	5,000	176,800	48,000	87,200	41,600
Total EU							
1995/96	51,899	783,193	143,920	979,012	543,202	317,689	118,121
1996/97	118,121	946,332	123,373	1,187,826	612,097	354,432	221,297
1997/98	221,297	789,400	121,000	1,131,697	622,500	355,741	153,456
Turkey							
1995/96	14,218	315,000	32	329,250	180,000	105,000	39,250
1996/97	39,250	290,000	0	329,250	185,000	108,000	36,250
1997/98	36,250	180,000	20,000	236,250	115,000	100,000	21,250
Chile							
1995/96	3,499	118,460	0	121,959	106,632	11,450	3,877
1996/97	3,877	120,485	0	124,362	102,166	11,650	10,546
1997/98	10,546	91,300	0	101,846	86,840	11,660	3,346
Mexico							
1995/96	0	40,000	1,000	41,000	31,000	10,000	0
1996/97	0	23,500	2,500	26,000	12,200	13,800	0
1997/98	0	37,000	500	37,500	23,500	14,000	0
Brazil							
1995/96	0	99,600	50,000	149,600	18,680	100,000	30,920
1996/97	30,920	73,000	26,234	130,154	19,240	108,000	2,914
1997/98	2,914	101,750	29,947	134,611	9,753	120,000	4,858
Grand Total							
1995/96	69,616	1,356,253	194,952	1,620,821	879,514	544,139	192,168
1996/97	192,168	1,453,317	152,107	1,797,592	930,703	595,882	271,007
1997/98	271,007	1,199,450	171,447	1,641,904	857,593	601,401	182,910

Source: U.S. Agricultural Attache Reports. 1/ Marketing Year July-June with the exception of France's which is August-July, Brazil's which is May-April, Mexico's which is March-February, and Turkey's which is September-August. 2/ 28-30 Percent TSS Basis. Note: For calendar year reference, 1995/96 MY becomes 1995 CY.



Table 4: United States 1/ Exports of Canned Tomatoes, Paste, Ketchup, and Tomato Sauce

Commodity/ Country	1992/93	1993/94	1994/95	1995/96	1996/97
----Metric tons----					
Canned Tomatoes:					
Canada	21,032	20,680	17,342	19,571	22,787
Japan	2,755	2,703	8,802	11,432	11,198
Korea, Rep.	349	321	439	920	2,181
Mexico	521	392	388	69	1,052
Australia	510	1,835	600	641	429
Hong Kong	230	230	250	230	348
Singapore	166	196	260	228	215
Others	3,591	2,473	1,945	3,161	7,346
Total	29,154	28,830	30,026	36,251	45,556
Tomato Paste:					
Canada	46,004	43,168	47,971	45,326	50,160
Japan	3,835	8,247	10,450	12,354	9,965
Korea, Rep.	4,638	4,800	1,862	5,908	7,502
Italy	0	77	6,361	5,255	8,451
Dominican Rep.	1,436	1,366	2	3,918	2,963
Haiti	48	403	2,219	2,615	3,631
Taiwan	218	1,145	2,600	2,444	1,239
Philippines	3,517	3,676	4,003	1,470	2,456
Colombia	53	1,081	461	1,112	1,228
Australia	1,246	6,332	121	721	1,118
Mexico	1,792	2,886	2,513	258	5,195
Others	4,024	4,633	11,323	6,260	35,083
Total	66,811	77,814	89,886	87,641	128,991
Tomato Sauce:					
Canada	40,721	47,350	46,193	47,644	52,684
Mexico	6,029	5,871	5,507	2,374	4,054
Japan	4,871	4,878	5,471	5,594	4,773
United Kingdom	977	4,763	4,978	1,866	1,776
Netherlands	720	1,215	1,405	986	1,243
Korea, Rep.	397	1,116	904	1,529	777
Saudi Arabia	439	893	953	1,017	952
Kuwait	675	536	341	940	723
Others	5,835	7,113	6,693	9,123	9,452
Total	60,664	73,735	72,445	71,073	76,434
Ketchup:					
Canada	1,412	1,221	5,666	6,545	4,890
Mexico	2,500	2,581	3,223	3,052	4,842
Japan	4,849	9,017	10,117	11,629	9,815
Korea, Rep.	172	2,443	7,389	1,151	670
Hong Kong	6,515	4,761	5,062	4,586	4,641
Saudi Arabia	1,490	1,419	1,513	1,768	1,228
Others	6,500	5,854	8,890	11,279	14,452
Total	23,438	27,296	41,860	40,010	40,538

1/ Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census.

Table 5: United States Imports of Canned Tomatoes <sup>1/</sup>

Country	1992/93	1993/94	1994/95	1995/96	1996/97
----Metric tons----					
European Union:					
Italy	15,715	16,961	24,166	23,119	44,155
Spain	1,156	5,816	6,410	2,878	7,092
Others	54	55	0	376	136
Total	16,925	22,832	30,576	26,373	51,383
South America:					
Argentina	678	0	0	0	0
Brazil	380	411	68	0	0
Chile	16,898	11,541	16,190	12,314	4,431
Others	19	2	5	5	6
Total	17,975	11,954	16,263	12,319	4,437
Other Countries:					
Canada	827	1,716	808	4,627	7,957
Israel	7,927	11,810	10,792	19,892	5,339
Morocco	0	361	4,648	599	740
Turkey	2,468	2,020	817	1,182	1,111
All Others	286	499	802	1,622	305
Grand Total	46,408	51,192	64,706	66,614	71,272

1/ Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census.  
 Note: The above statistics include the following (HTS) Harmonized Tariff Schedule commodity codes: 2002900050, 2002100020, 2002100040, 2002100050, and 2002100090.

Table 6: United States Imports of Tomato Sauce 1/

Country	1992/93	1993/94	1994/95	1995/96	1996/97
----Metric tons----					
Canada	3,200	2,982	3,172	4,679	4,976
Dominican Rep.	1,463	827	2,124	1,522	1,641
Italy	195	200	489	217	504
Chile	1,357	289	0	0	0
All Others	165	799	629	865	530
Grand Total	6,380	5,097	6,414	7,283	7,651

1/ Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census.  
 Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2103204020 and 2103204040.

Table 7: United States Imports of Tomato Paste and Puree <sup>1/</sup>

Country	1992/93	1993/94	1994/95	1995/96	1996/97
----Metric tons----					
Mexico	20,312	28,428	7,985	8,004	7,381
Chile	7,789	6,576	4,395	4,334	667
Canada	1,439	5,346	9,646	6,242	387
Italy	1,025	1,352	1,385	957	1,091
Israel	776	1,330	2,825	3,675	4,440
Spain	332	1,308	86	84	139
All Others	2,088	1,859	898	338	1,196
Grand Total	33,761	46,199	27,220	23,634	15,301

<sup>1/</sup> Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census.  
Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity codes: 2002900010, 2002900030, and 2002900040.

Table 8: United States Imports of Ketchup <sup>1/</sup>

Country	1992/93	1993/94	1994/95	1995/96	1996/97
----Metric tons----					
Canada	186	397	10,347	18,186	17,097
Chile	4	0	0	0	0
All Others	40	17	10	10	40
Grand Total	226	414	10,357	18,196	17,132

<sup>1/</sup> Marketing Year July-June. Source: U.S. Department of Commerce, Bureau of the Census.  
Note: The above statistics include the following HTS (Harmonized Tariff Schedule) commodity code: 2103202000.

## Orange Juice Outlook for Selected Countries

Orange juice production in the major Northern Hemisphere producing countries in 1997/98 is forecast at a record 1.29 million metric tons, 10 percent above the previous year's level. A record orange crop and processing in the United States account for the record orange juice output. These large supplies and low prices will continue to challenge the marketing ability of exporters. Northern Hemisphere orange juice exports in 1997/98 are also forecast at a record, based on likely higher U.S. exports. U.S. orange juice exports in 1996/97 reached a record 104,450 tons, 14 percent above the previous year's shipments. Awareness of the good quality of U.S. orange juice and private industry market promotion efforts helped boost U.S. exports.

### Summary: Northern Hemisphere

Orange juice production in 1997/98 in selected producing countries in the Northern Hemisphere is forecast to increase by 10 percent to 1.29 million metric tons (65 degree brix). All of the selected major producing orange juice countries are expected to have increased production with the exception of Italy and Turkey. U.S. orange juice accounts for 88 percent of the total Northern Hemisphere 1997/98 orange juice production forecast.

Total orange juice exports in 1997/98 for selected countries in the Northern Hemisphere are forecast at 254,897 tons, 9 percent above the previous year's shipments. Higher exports are forecast for the United States, Morocco, and Mexico, while orange juice shipments from all other selected countries are expected to decrease or remain the same in 1997/98.

### United States

U.S. orange juice production in 1997/98 is forecast at a record 1.13 million metric tons, 10 percent above last season's output. More oranges will likely be processed in 1997/98 as a result of an expected record orange harvest in Florida. The Florida frozen concentrate orange juice (FCOJ) yield is forecast at 1.55 gallons (42 degrees brix) per box, 1 percent below the 1996/97 yield. Florida is expected to account for 96 percent of total U.S. orange juice output.

U.S. orange juice exports should continue to expand in 1997/98, with exports forecast at a record 120,000 tons, 15 percent above last

year's shipments. Major U.S. customers are the European Union (EU), Canada, Japan, and Korea. The EU accounted for 42 percent of total U.S. orange juice exports in 1996/97 (December/November). Canada, Japan, and Korea accounted for 27, 9, and 4 percent, respectively. Increased demand for higher quality single strength orange juice and strong marketing efforts by U.S. companies have boosted exports in recent years.

Imports of FCOJ in 1997/98 are forecast at 160,000 tons, down 33 percent from the previous year due to large supplies. Recently, Brazilian owned processing plants in Florida have imported Brazilian FCOJ (65 degree brix) into Florida and re-exported the U.S. "not from concentrate" juice as single strength (42 degree brix), a higher quality juice product. This trend is likely to continue.

Ending stocks in 1997/98 are forecast to increase significantly due to the projected record juice production.

### Mexico

Mexico's orange juice production in 1997/98 is forecast at 41,000 tons, slightly above last year's output. FCOJ production in Mexico depends heavily on the international price of FCOJ. Current low international prices will make it difficult for processors to compete with the fresh market for the domestic crop.

Mexico's orange juice exports in 1997/98 are forecast at 39,000 tons, up 2 percent from



shipments in 1996/97. The United States is the main market for Mexican FCOJ with Japan and the European Union also important customers.

Under NAFTA, Mexico has access to the United States market for 40 million gallons of FCOJ, single strength equivalent (or 28,452 tons, 65 degrees brix) at a duty of 4.625 cents per liter. Beyond the 40 million gallon level, and up to 70 million gallons SSE, the full NAFTA rate for 1998 of 8.094 is applied. If snapback price conditions are not in effect, the NAFTA rate would continue to be applied beyond the 70 million gallon level. However, if price conditions are in snapback, the full MFN rate, currently, 8.32 cents per liter for 1998, would be assessed on all imported volumes beyond the 70 million gallon threshold. This basic mechanism will remain in effect during the 15-year phase-in period agreed upon in the NAFTA negotiations, although the quantity trigger level will be increased to 90 million gallons SSE in year 2003.

#### Spain

Spain's orange juice production in 1997/98 is forecast at 43,000 tons, 9 percent above the revised 1996/97 level. An increase in deliveries to processors is expected due to a larger orange harvest. Oranges used in Spain to produce juice are mainly those that cannot be marketed for fresh consumption. Most orange processing plants in Spain are located in the Valencia region.

Spain's orange juice exports in 1997/98 are forecast at 56,000 tons, 3 percent below last year's shipments. The bulk of orange juice exports are expected to go to traditional export markets in the EU such as France, Germany, and the United Kingdom. Strong competition from Brazil, Israel, and other key producing Mediterranean countries represent the principal obstacles to the expansion of Spanish citrus juice exports to third countries.

#### Greece

Greece's orange juice production in 1997/98 is forecast at 15,400 tons, 4 percent above last year's revised estimate. In the past, growers

were able to take advantage of the withdrawal system to dispose of excess fruit. However, withdrawal quantities and prices are being reduced annually through the year 2002. As a result, quantities of fresh oranges to be processed are expected to increase. Production of concentrated orange juice in Greece encounters strong competition from imported frozen Brazilian product. Greece's orange juice exports, which are mainly destined to Eastern Europe, are forecast at 3,000 tons in 1997/98, 14 percent below last year's shipments.

#### Morocco

Moroccan orange juice production is forecast to increase sharply to 15,900 tons in 1997/98. In 1996/97 citrus processing was down sharply with only 2 percent of the crushing capacity being used. High fresh citrus prices in the local market and failure to appeal to producers caused the largest processor to close its mills temporarily. In 1997/98 however, the citrus situation is expected to change dramatically as FRUMAT's role will be crucial in absorbing excess citrus production. The Government of Morocco has announced that it intends to support FRUMAT financially in order to enable it to purchase excess local production, thus preventing serious financial difficulties for citrus growers.

Orange juice exports in 1997/98 are forecast at 8,500 tons, 85 percent above last year's shipments, due to the expected increase in processing. Morocco's orange juice is normally exported to the European Union, mainly France and Germany.

#### Japan

Japan's imports of orange juice in 1997/98 are forecast at 90,000 metric tons, 2 percent above last year's imports based on expected increased domestic consumption and lower prices. Although fruit juice beverages compete heavily with low-calorie beverages, organic fruit and vegetable juices are extremely popular. Companies such as Kirin Tropicana and Zenno currently market various types of organic fruit juice. Japanese juice processors are expected to follow suit in the future.

Brazil is the major supplier to Japan, accounting for 70 percent of total Japanese imports of orange juice. The United States ranks second with a 24 percent market share. A Brazilian bulk orange juice storage terminal, inaugurated in 1993, has been operating at less than capacity. Japanese importers have found it more economical to receive FCOJ imports in 200 liter drums.

Japanese imports of single strength orange juice (SSOJ), although small compared to FCOJ, have increased significantly in recent years. Imports of SSOJ are expected to continue strong as consumers show a growing preference for more natural and fresh orange juice taste. The United States supplies the vast majority of Japan's imports of SSOJ.

#### Korea

Korean orange juice imports in 1997/98 are forecast at 56,500 tons, about the same as the previous year's imports. On July 1, 1997, orange juice imports were liberalized based on a Record of Understanding (ROU) signed between Korea and the United States on Agricultural Market Access in the Uruguay Round. It states that "Orange juice shall be liberalized by July 1, 1997, with nothing but a bound 60 percent duty remaining." Brazil is the main supplier of orange juice to Korea, followed by the United States.

#### **Major Producers in the Southern Hemisphere**

It is too early to make reliable forecasts for Southern Hemisphere countries for 1997/98 (1998 harvest).

#### Brazil

The Sao Paulo's 1997 orange crop (marketed in 1997/98) is estimated at 423 million 40.8 kilo boxes, 16 percent above the previous year's output. See Table 5 on page 42 for more detail.

Brazil's 1996/97 orange juice production estimate (marketed in 1997/98) is estimated at 1.36 million tons, 9 percent above the previous estimate. This increase is mainly due to a

larger harvest and more oranges being processed than earlier expected. Most processing companies have already finished their operations, and those which are still processing, are expected to work until the end of January or the beginning of February.

In 1996/97 (MY 1997/98), Brazil's orange juice exports are estimated at 1.2 million tons, 3 percent above last year's shipments. Ending stocks are expected to be larger because of the higher production estimate.

#### **Outlook for Sao Paulo orange crop**

On January 15, the Institute of Agricultural Economics (IEA) of Sao Paulo released its first orange production forecast for the 1998 Sao Paulo crop (marketed in 1998/99) at 369.6 million boxes. On January 23 the Brazilian Association of Citrus Exporters (ABECITRUS) released an unofficial forecast of 325 million boxes for the new crop. ABECITRUS is scheduled to release an official forecast for the new orange crop in May. According to some sources, oranges delivered for processing may range from 220 to 260 million boxes. The Agricultural Trade Officer in Sao Paulo will release his first forecast for the 1998 Sao Paulo orange crop in early June.

According to Post contacts, most sources expect the 1998 Sao Paulo orange crop to be lower than the current season due to adverse weather conditions during flowering; an increase in problems related to citrus canker and Citrus Chlorosis Variegated (CVC); and some citrus growers abandoning groves due to financial and disease problems.

*For further information on production, supply, distribution, and trade contact Debbie Seidband, Horticultural and Tropical Products Division, (202) 720-6877. For information on U.S. marketing opportunities, contact Ted Goldammer at (202) 720-8498.*

**Table 1**  
**ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING**  
**COUNTRIES IN NORTHERN HEMISPHERE**  
**METRIC TONS, 65 DEGREES BRIX 1/**

Country/Year 2/	Begin. Stocks	Production	Imports	Exports	Consumption	Ending Stocks
Greece 3/						
1994/95	5,783	11,800	7,793	3,502	16,500	5,374
1995/96	5,374	12,900	5,000	4,000	17,000	2,274
1996/97	2,274	14,850	5,000	3,500	17,000	1,624
1997/98 F	1,624	15,400	4,500	3,000	17,000	1,524
Italy 4/						
1994/95	32,782	30,780	4,001	18,930	22,316	26,317
1995/96	26,317	36,936	3,386	20,623	23,085	22,931
1996/97	22,931	33,858	3,848	21,546	23,855	15,236
1997/98 F	15,236	32,319	3,848	21,546	23,855	6,002
Mexico 4/						
1994/95	0	65,000	280	60,000	2,280	3,000
1995/96	3,000	45,000	1	42,875	2,126	3,000
1996/97	3,000	40,000	1	37,907	2,100	3,000
1997/98 F	3,000	41,000	1	38,851	2,150	3,000
Morocco 5/						
1994/95	9,958	3,450	1,249	6,500	4,550	3,607
1995/96	3,607	10,206	1,000	7,762	2,195	4,856
1996/97	4,856	568	0	1,310	1,284	2,830
1997/98 F	2,830	15,900	0	8,500	2,400	7,830
Spain 6/						
1994/95	0	48,000	20,000	53,000	15,000	0
1995/96	0	59,000	23,000	67,000	15,000	0
1996/97	0	39,000	34,000	58,000	15,000	0
1997/98 F	0	43,000	30,000	56,000	17,000	0
Turkey 5/						
1994/95	2,600	9,200	2,134	1,023	9,000	3,911
1995/96	3,911	8,420	6,608	7,810	9,200	1,929
1996/97	1,929	8,500	8,000	7,500	9,500	1,429
1997/98 F	1,429	8,500	8,000	7,000	9,700	1,229



**Table 1 (continued)**  
**ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING**  
**COUNTRIES IN NORTHERN HEMISPHERE**  
**METRIC TONS, 65 DEGREES BRIX 1/**

Country/Year	Begin. Stocks	Production	Imports	Exports	Consumption	Ending Stocks
<b>United States 7/</b>						
1994/95	256,358	894,239	141,140	83,547	1,006,893	201,297
1995/96	201,297	913,070	185,480	91,786	996,094	211,967
1996/97	211,967	1,029,000	182,466	104,450	1,043,623	275,360
1997/98 F	275,360	1,130,000	160,000	120,000	1,100,000	345,360
<b>TOTAL</b>						
1994/95	307,481	1,062,469	176,317	226,502	1,076,259	243,506
1995/96	243,506	1,085,532	224,484	241,856	1,066,861	244,805
1996/97	244,805	1,165,776	233,315	234,213	1,110,504	299,479
1997/98 F	299,479	1,286,119	206,349	254,897	1,172,105	364,945

1/ Includes all processed orange juice whether or not concentrated. One metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,405.88 gallons at single strength equivalent.

2/ Year refers to marketing period which usually begins in the fall of the Northern Hemisphere and corresponds to the harvesting and marketing period for fresh citrus.

3/ Marketing season begins September 1 of first year shown.

4/ Marketing season begins January 1 of second year shown.

5/ Marketing season begins October 1 of first year shown.

6/ Marketing season begins November 1 of first year shown.

7/ Marketing season begins December 1 of first year shown

F/ Forecast

**Source:** National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census.  
Florida Department of Citrus. Reports from U.S. Agricultural Counselors and Attaches and/or FAS/USDA estimates.



**Table 2**  
**ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING**  
**COUNTRIES IN SOUTHERN HEMISPHERE**  
**METRIC TONS, 65 DEGREES BRIX 1/**

<b>Country/Year 2/</b>	<b>Begin. Stocks</b>	<b>Production</b>	<b>Imports</b>	<b>Exports</b>	<b>Consumption</b>	<b>Ending Stocks</b>
<b>Argentina 3/</b>						
1994/95	0	12,500	3,668	4,509	11,659	0
1995/96	0	10,000	8,589	2,403	16,000	186
1996/97	186	10,000	8,000	1,900	16,100	186
1997/98	NA	NA	NA	NA	NA	NA
<b>Australia 4/</b>						
1994/95	18,183	14,190	21,009	1,587	36,149	15,647
1995/96	15,647	17,465	23,839	1,710	38,592	16,649
1996/97	16,649	16,009	18,075	1,807	39,569	9,357
1997/98	NA	NA	NA	NA	NA	NA
<b>Brazil 4/ 5/</b>						
1994/95	155,000	1,085,000	0	1,050,000	18,000	172,000
1995/96	172,000	1,152,000	0	1,181,000	17,000	126,000
1996/97	126,000	1,360,000	0	1,215,000	18,000	253,000
1997/98	NA	NA	NA	NA	NA	NA
<b>South Africa 6/</b>						
1994/95	3,282	12,778	0	4,550	10,100	1,410
1995/96	1,410	13,475	0	3,675	10,000	1,210
1996/97	1,300	12,413	200	2,500	10,133	1,280
1997/98	NA	NA	NA	NA	NA	NA
<b>TOTAL</b>						
1994/95	176,465	1,124,468	24,677	1,060,646	75,908	189,057
1995/96	189,057	1,180,940	32,428	1,147,788	84,592	170,045
1996/97	170,135	1,318,422	26,275	1,166,207	85,802	262,823
1997/98	NA	NA	NA	NA	NA	NA

1/ Includes all processed orange juice whether or not concentrated. One metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,405.88 gallons at single strength equivalent.

2/ Marketing year indicated is for aggregation purposes with countries from the Northern Hemisphere corresponding to the harvesting and marketing period for fresh citrus. For the Southern Hemisphere, orange harvest occurs entirely during the second year shown.

3/ Marketing season begins January 1 of second year shown.

4/ Marketing season begins July 1 of second year shown.

5/ Includes small quantities of tangerine juice.

6/ Marketing season begins February 1 of second year shown.

**Source:** National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census. Florida Department of Citrus. Reports from U.S. Agricultural Counselors and Attaches and/or FAS/USDA estimates.

**Table 3**  
**U.S. IMPORTS OF ORANGE JUICE**  
**MARKETING YEARS 1992/93-1996/97**  
**Metric Tons, 65 Degrees Brix<sup>1</sup>**

Origins	1992/93	1993/94	1994/95	1995/96	1996/97
Mexico	13,992	31,151	50,245	32,984	36,065
Belize	6,111	5,900	5,731	6,845	13,395
Honduras	2,608	1,952	4,080	4,055	5,000
Costa Rica	1,752	2,863	4,849	5,909	14,814
Brazil	204,955	243,377	73,427	132,473	110,925
Other Countries	2,641	2,641	2,808	3,214	2,267
Grand Total	231,969	287,884	141,140	185,480	182,466

<sup>1</sup>Data includes both frozen concentrate and single strength, orange juice.

**Table 4**  
**U.S. EXPORTS OF ORANGE JUICE**  
**MARKETING YEARS 1992/93-1996/97**  
**Metric Tons, 65 Degrees Brix<sup>1</sup>**

Destination	1992/93	1993/94	1994/95	1995/96	1996/97
<b>North America</b>					
Canada	27,610	18,354	22,719	24,838	28,440
Mexico	241	392	251	591	650
Subtotal	27,852	18,746	22,970	25,429	29,090
<b>The European Union (EU)</b>					
France	9,577	7,849	8,027	18,469	13,045
Belgium/Luxembourg	4,601	6,610	7,810	4,548	8,513
Netherlands	4,255	4,648	13,234	11,513	17,995
United Kingdom	3,131	4,357	4,445	4,025	3,052
Greece	2,045	457	271	211	260
Germany	731	558	783	470	562
Sweden	1,385	915	854	219	192
Other	676	1,609	264	215	326
Subtotal	26,401	27,003	35,690	39,670	43,945
<b>Other Western Europe</b>					
Norway	2,589	2,060	1,414	871	484
Other	637	336	447	231	10,276
Subtotal	3,226	2,396	1,861	1,102	10,760
<b>East Asia</b>					
Japan	7,773	13,801	4,726	11,087	9,863
South Korea	6,058	4,950	3,880	4,104	4,102
Hong Kong	2,407	1,496	2,501	2,372	1,020
Taiwan	2,144	1,822	1,740	1,122	575
Other	1,106	797	1,567	1,356	557
Subtotal	19,488	22,866	14,414	20,041	16,117
Other Countries	4,188	4,534	8,612	5,544	4,538
<b>Grand Total</b>	<b>81,153</b>	<b>75,545</b>	<b>83,547</b>	<b>91,786</b>	<b>104,450</b>

<sup>1</sup> Data includes both frozen concentrate and single strength orange juice.

**Table 5**  
**BRAZIL: SUPPLY AND DISTRIBUTION OF ORANGES AND FCOJ 1/**

	1994	1995	1996	1997
<b>Oranges, Sao Paulo</b>	<b>Million Boxes 2/</b>			
Production 3/	311	357	366	423
Fresh Consumption	62	92	95	98
Fresh Exports	3	2	2	2
Processed	246	263	269	323
<b>FCOJ, Brazil</b>	<b>1,000 Metric Tons, 65 Degrees Brix 4/</b>			
Beginning Stocks 5/	105	155	172	126
Production				
Sao Paulo	1,110	1,062	1,122	1,330
Other States	16	23	30	30
Total	1,126	1,085	1,152	1,360
Exports 6/				
Sao Paulo	1,038	1,027	1,151	1,180
Other States	16	23	30	30
Total	1,054	1,050	1,181	1,215
Consumption	22	18	17	18
Ending Stocks	155	172	126	253
<b>FCOJ Yields (kg/box)</b>	<b>4.51</b>	<b>4.02</b>	<b>4.16</b>	<b>4.11</b>

1/ Harvesting and processing usually begin in late April or early May. Marketing season for FCOJ begins on July 1 of year indicated.

2/ 40.8 kilograms or 90 pounds.

3/ Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines used for processing.

4/ One metric ton at 65 degrees Brix equals 344.8 gallons at 42 degrees Brix, or 1,405.88 gallons at single strength equivalent.

5/ Sao Paulo stocks.

6/ Includes tangerine juice.



## World Fresh Citrus Situation

Citrus production in selected countries in the Northern Hemisphere in 1997/98 is forecast at a record 49.6 million metric tons, up 7 percent from last year's harvest. Selected Northern Hemisphere country citrus exports in 1997/98 are forecast to increase 7 percent to a record 6.8 million tons, due primarily to expected larger orange and tangerine harvests in Spain and Morocco. Larger exports from Spain and Morocco will likely more than offset expected lower U.S. shipments. U.S. fresh citrus exports in 1997/98 are forecast at 1.18 million tons, 4 percent below the previous year's record shipments. Although world citrus prices are expected to be lower because of larger supplies, the strong U.S. dollar is expected to make U.S. exports less competitive in Asia. The amount of oranges expected to be processed by Northern Hemisphere countries in 1997/98 is forecast at a record 16.4 million tons, 7 percent above the previous year's level. More citrus is expected to be processed because of a record Florida orange harvest.

### Summary

#### Northern Hemisphere

Total citrus production in 1997/98 in major producing countries is estimated at a record 49.6 million tons, up 7 percent from the 1996/97 crop. Northern Hemisphere orange production in 1997/98 is forecast at 28.9 million tons, up 10 percent from 1996/97 based on increases in the United States, Mexico, Morocco, and Spain. Tangerine production is forecast at 13.2 million tons, 12 percent above last year's output. This larger production is due mainly to increases in China, Spain and Japan. Selected country grapefruit production is forecast at 3.5 million tons, down 5 percent from the previous year's output due to a smaller U.S. production. Production of lemons and other citrus, mostly limes, is forecast to remain unchanged from the previous year's output.

Total fresh citrus exports in 1997/98 are forecast at 6.8 million tons, up 7 percent from the 1996/97 volume. A forecast 55 percent increase in Moroccan citrus exports (primarily oranges) and an 18 percent increase in Spain's exports (primarily oranges and tangerines), are expected to more than offset lower exports from the United

States. Lower U.S. grapefruit exports, primarily to Japan, due to the strong U.S. dollar and available substitutes from competing suppliers, are expected to account for most of the decrease in total U.S. citrus exports.

#### United States

Total citrus production in the United States in 1997/98 is forecast at 16.9 million tons, up 8 percent from the previous year's harvest. If realized, this could be the largest crop on record. Orange production in 1997/98 is forecast at a record 13.1 million tons, up 11 percent from last year's output. Production is forecast to increase in both Florida (where most of the oranges are processed) and California (where most of the oranges are for fresh consumption and export). Grapefruit production in 1997/98 however, is forecast to decrease 5 percent to 2.5 million tons. Although the lower Florida grapefruit production forecast relieved some concerns that production would be another record, high grapefruit juice stocks will put more pressure on increasing fresh grapefruit exports and consumption.

Total U.S. citrus exports in 1997/98 are forecast at 1.18 million tons, down 4 percent from the previous year's shipments. Orange exports in

1997/98 are forecast to fall by only 2 percent, as likely lower world prices, due to large supplies, are expected to partially offset the impact of the strong U.S. dollar on Asian imports. U.S. orange exports in 1996/97 reached a record 600,937 tons, valued at a record \$330 million. Canada and Hong Kong accounted for most of the increased sales in 1996/97. However, U.S. grapefruit exports in 1997/98 are forecast to decrease by 8 percent as lower imports are expected from Japan due to that country's weak economy, the strong U.S. dollar, and the increased availability of competitor supplies. U.S. grapefruit exports in 1996/97 decreased 4 percent to 480,299 tons, as lower sales to Japan accounted for all of the decrease.

U.S. citrus for processing in 1997/98 is forecast at a record 12.3 million metric tons based on a record Florida orange harvest. A likely sharp increase in oranges processed is expected to more than offset likely lower processing of grapefruit due to large grapefruit juice stocks.

### Mexico

Mexican citrus production is forecast at 5.5 million metric tons in 1997/98, 10 percent above last year's output. Most of this increase is attributed to increased production of oranges. Orange production is forecast at 4 million tons, up 13 percent from the previous year. Favorable weather conditions and more trees coming into production account for the increase. Tangerine production is forecast at 270,000 tons, 4 percent above last year's production. Production of grapefruit and limes are also forecast to increase, 6 and 2 percent; respectively, due to increased acreage. Lemon production is forecast to remain at the same level as last year.

Exports of oranges in 1997/98 are forecast at 9,000 tons, up 11 percent from the previous year. The United States is the largest export market for Mexican oranges. Mexican exporters continue to explore Asian markets such as Hong Kong and Japan.

### Spain

The total Spanish citrus crop for 1997/98 is

estimated at 5 million metric tons, 25 percent above last year's output. Orange production is expected to increase 20 percent; tangerines, up 25 percent; and lemons, up 38 percent. The increase in citrus production in 1997/98 is due to favorable weather.

Spain is the world's largest citrus exporter, accounting for 44 percent of total Northern Hemisphere exports. Citrus exports are expected to increase 15 percent in 1997/98 due to the increased production. The majority of Spanish citrus is exported to other European Union countries, which account for 85 percent of total citrus exports. The bulk of these exports will go to traditional markets such as Germany, France, the Netherlands, and the United Kingdom.

### Morocco

Morocco's citrus production in 1997/98 is forecast at 1.57 million tons, 24 percent above last year's output. This increase is mainly due to the upcoming year being the high of the citrus trees' bearing cycle. The majority of the increase in production will come from oranges in the Souss area.

Citrus exports in 1997/98 are forecast at 700,000 tons, 55 percent above the previous year's shipments, based on the expected larger orange crop. The European Union accounts for about 85 percent of Morocco's total orange exports. The proximity of the EU and the preferential duties to which Moroccan citrus are subject to upon entry will continue to make the EU appealing to Moroccan exporters. Morocco also supplies fresh citrus to "contract markets" such as Canada, Middle East countries, and some Scandinavian countries. More recently, Morocco has been exporting citrus to East European countries (Russia, Poland, and Lithuania), which are less demanding in quality and thus are supplied with fruit that would normally go to the domestic market.

More citrus is expected to be processed in 1997/98 based on the expected larger supplies. The Government of Morocco announced its intention to support the largest processor

financially in order to enable it to purchase excess local production.

### **Korea**

The main citrus crop in Korea is tangerines. Tangerine production in 1997/98 is forecast at 700,000 tons, 31 percent above last year's output. Favorable weather has contributed to this increased production.

Orange imports into Korea were liberalized on July 1, 1997, according to terms of the Record of Understanding signed between Korea and the United States under the Uruguay Round. Liberalization now means the market operates under a tariff rate quota system. However, the market's liberalization has not progressed smoothly because of phytosanitary issues, which are slowly being resolved. In-quota orange imports in 1997 totaled 25,000 tons. July-August 1997 out-of-quota imports totaled 12,470 tons, with out of quota imports forecast to reach 50,000 tons. The 1998 in-quota quantity is 28,125 tons. It is not clear what 1998 out-of-quota imports will be because of the current weak economy and the strong U.S. dollar.

### **Japan**

Total citrus production in 1997/98 is forecast at 1.9 million tons, 18 percent above the 1996/97 output. Tangerine production, which accounts for most of the citrus production, is forecast at 1.8 million tons, up 20 percent from the previous year's output. The higher production is due largely to favorable weather.

Japan's total citrus imports in 1997/98 are forecast to decrease 15 percent to 470,000 tons, due to the weak economy and strong U.S. dollar. The United States continues to be the main supplier of oranges, grapefruit, and lemons to Japan. U.S. orange exports to Japan increased 8 percent over the last year. However, the United States continues to face competition in the fresh orange market. For example, Australia and South Africa have increased their orange exports to Japan 31 and 43 percent respectively over the past year. Suppliers in these countries tend to ship after the

main growing season for U.S. oranges, but may increasingly be encroaching on the traditional sales period for California fruit. Spain and Chile began exporting oranges to Japan for the first time in 1997, although sales were small. Historically, Israel has been the United States' major competitor in grapefruit exports to Japan. However, this past year, imports from Israel fell approximately 10 percent due to unstable fruit quality of the "Sweetie", a green-skinned grapefruit. South Africa is fast becoming a new exporter of grapefruit to Japan. Exports of the "Outspan" variety have grown ten fold since 1995. The majority of shipments usually occur during June through August.

### **China**

China's total citrus production in 1997/98 is forecast at 8.3 million tons, 9 percent over last year's output. Oranges and tangerines are forecast to increase 11 and 8 percent respectively in 1997/98 due to more trees coming into production.

Total citrus exports in 1997/98 are forecast at 151,000 tons, unchanged from last year's shipments. Tangerines account for most of China's citrus exports.

Although fresh citrus imports face phytosanitary barriers and high tariffs, substantial amounts of U.S. and South African navels and Valencia oranges are reportedly transshipped through Hong Kong to China.

### **Southern Hemisphere**

It is too early to make reliable forecasts for the Southern Hemisphere countries for the 1997/98 season (harvest in 1998).

Total citrus production in selected countries in the Southern Hemisphere in 1996/97 (harvest in 1997) has been revised up 3 percent from the July forecast to 24.3 million tons. For **Brazil**, the 1996/97 fresh orange crop has been increased 11 percent to 19.1 million tons, based on a larger Sao Paulo harvest than earlier expected. Fresh orange consumption for 1996/97 has been reduced 3



percent from the previous estimate due to economic measures taken by the Brazilian government to address disequilibria in both the domestic and international financial markets. The level of fresh oranges going towards processing in 1996/97 has been increased by 7 percent to 13.3 millions tons based on the amount of oranges processed to date.

**South Africa's** 1996/97 orange crop has been increased from 986,000 to 1 million tons. It is forecast that 1997 production increased due to good rains. However, unseasonably warm weather delayed fruit coloring and negatively affected fruit quality. South Africa exports fresh citrus to the European Union, United States, the Middle East, and Asia.

Total citrus production in **Argentina** in 1997 is revised up 4 percent to 2 million tons. The increase in citrus production is mainly due to new plantings, the renewal of old groves, favorable weather, and improved management of the citrus groves.

*For further information on production, supply, distribution, and trade contact Debbie Seidband, Horticultural and Tropical Products Division, (202) 720-6877. For information on U.S. marketing opportunities, contact Ted Goldammer at (202) 720-8498.*



**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**

**1995/96 - 1997/98 1/  
(1,000 METRIC TONS)  
TABLE 1: TOTAL CITRUS**

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
<b>Northern Hemisphere Mediterranean Basin</b>						
<b>Cyprus 4/</b>						
	1995/96	316	0	163	46	107
	1996/97	288	0	150	48	90
	1997/98	255	0	120	48	87
<b>Egypt 4/</b>						
	1995/96	2,145	0	218	1,907	20
	1996/97	2,371	0	258	2,090	23
	1997/98	2,175	0	202	1,945	28
<b>Gaza 4/</b>						
	1995/96	89	0	80	9	0
	1996/97	84	0	75	9	0
	1997/98	84	0	75	8	0
<b>Greece</b>						
	1995/96	1,065	10	410	402	263
	1996/97	1,108	9	438	351	328
	1997/98	1,130	9	435	369	335
<b>Israel</b>						
	1995/96	1,010	28	305	191	522
	1996/97	939	31	285	190	495
	1997/98	892	23	251	152	225
<b>Italy</b>						
	1995/96	3,445	116	244	2,263	1,054
	1996/97	3,331	122	200	2,251	1,002
	1997/98	3,150	85	210	2,115	910
<b>Morocco 4/</b>						
	1995/96	1,436	0	566	774	96
	1996/97	1,194	0	451	737	6
	1997/98	1,570	0	700	720	150
<b>Spain</b>						
	1995/96	4,730	73	2,771	1,192	840
	1996/97	4,025	77	2,547	965	590
	1997/98	4,999	37	3,012	1,215	809
<b>Turkey 4/</b>						
	1995/96	1,778	22	373	1,247	180
	1996/97	1,695	50	295	1,275	175
	1997/98	1,415	155	205	1,208	157
<b>Subtotal Mediterranean Basin</b>						
	1995/96	16,014	249	5,130	8,031	3,082
	1996/97	15,035	289	4,699	7,916	2,709
	1997/98	15,670	309	5,210	7,780	2,701
<b>Other Northern Hemisphere</b>						
<b>China, People's Republic of</b>						
	1995/96	7,236	4	146	6,733	361
	1996/97	7,580	12	152	7,070	370
	1997/98	8,336	20	151	7,832	373
<b>Cuba</b>						
	1995/96	650	0	105	358	187
	1996/97	600	0	95	323	182
	1997/98	586	0	95	311	180
<b>Japan</b>						
	1995/96	1,764	527	6	2,106	179
	1996/97	1,554	552	5	1,976	125
	1997/98	1,904	470	6	2,164	204

**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**  
**1995/96 - 1997/98 1/**  
**(1,000 METRIC TONS)**  
**TABLE 1: TOTAL CITRUS**

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
<b>Korea, Republic of</b>					
1995/96	615	1	1	568	47
1996/97	480	1	1	468	12
1997/98	700	1	2	692	7
<b>Mexico</b>					
1995/96	5,028	14	163	4,212	667
1996/97	4,950	15	164	4,177	624
1997/98	5,500	16	172	4,706	638
<b>United States</b>					
1995/96	14,248	193	1,152	2,990	10,299
1996/97	15,688	198	1,227	3,348	11,311
1997/98	16,896	188	1,175	3,667	12,260
<b>Subtotal Other Northern Hemisphere</b>					
1995/96	29,541	739	1,573	16,967	11,740
1996/97	30,852	778	1,644	17,362	12,624
1997/98	33,922	695	1,601	19,372	13,662
<b>Total Northern Hemisphere</b>					
1995/96	45,555	988	6,703	24,998	14,822
1996/97	45,887	1,067	6,343	25,278	15,333
1997/98	49,592	1,004	6,811	27,152	16,363
<b>Southern Hemisphere</b>					
<b>Argentina</b>					
1995/96	1,975	12	326	991	670
1996/97	2,060	10	322	1,053	695
1997/98	NA	NA	NA	NA	NA
<b>Australia</b>					
1995/96	581	13	107	229	258
1996/97	579	13	120	237	235
1997/98	NA	NA	NA	NA	NA
<b>Brazil</b>					
1995/96	18,259	0	91	6,601	11,567
1996/97	20,387	0	91	6,768	13,528
1997/98	NA	NA	NA	NA	NA
<b>South Africa</b>					
1995/96	1,173	0	753	142	278
1996/97	1,221	115	817	227	292
1997/98	NA	NA	NA	NA	NA
<b>Total Southern Hemisphere</b>					
1995/96	21,988	25	1,277	7,963	12,773
1996/97	24,247	138	1,350	8,285	14,750
1997/98	NA	NA	NA	NA	NA
<b>Total World</b>					
1995/96	67,543	1,013	7,980	32,961	27,595
1996/97	70,134	1,205	7,693	33,563	30,083
1997/98	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

4/Estimates carried over from July 1997 circular

**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**

**1994/95 - 1996/97 1/  
(1,000 METRIC TONS)  
TABLE 2: FRESH ORANGES**

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
<b>Northern Hemisphere Mediterranean Basin</b>						
<b>Cyprus</b>	1995/96	170	0	76	30	64
	1996/97	165	0	80	30	55
	1997/98	150	0	70	30	50
<b>Egypt</b>	1995/96	1,555	0	206	1,339	10
	1996/97	1,613	0	240	1,361	12
	1997/98	1,370	0	180	1,175	15
<b>Gaza 4/</b>	1995/96	73	0	67	6	0
	1996/97	73	0	67	6	0
	1997/98	73	0	67	6	0
<b>Greece</b>	1995/96	854	2	330	277	249
	1996/97	880	2	356	236	290
	1997/98	900	2	350	252	300
<b>Israel</b>	1995/96	440	20	147	93	200
	1996/97	367	20	115	92	180
	1997/98	400	15	143	92	180
<b>Italy</b>	1995/96	2,200	36	135	1,451	650
	1996/97	2,100	28	98	1,430	600
	1997/98	2,000	30	100	1,380	550
<b>Morocco</b>	1995/96	1,013	0	378	553	82
	1996/97	774	0	261	507	6
	1997/98	1,120	0	470	500	150
<b>Spain</b>	1995/96	2,573	44	1,325	742	550
	1996/97	2,145	50	1,180	600	415
	1997/98	2,585	30	1,375	740	500
<b>Turkey</b>	1995/96	842	21	88	689	86
	1996/97	800	50	75	690	85
	1997/98	750	100	50	715	85
<b>Subtotal Mediterranean Basin</b>						
	1995/96	9,720	123	2,752	5,180	1,891
	1996/97	8,917	150	2,472	4,952	1,643
	1997/98	9,348	177	2,805	4,890	1,830
<b>Other Northern Hemisphere</b>						
<b>China</b>	1995/96	1,727	4	16	1,629	86
	1996/97	1,850	12	17	1,750	95
	1997/98	2,086	20	16	1,992	98
<b>Cuba</b>	1995/96	380	0	40	265	75
	1996/97	350	0	40	235	75
	1997/98	350	0	40	235	75
<b>Japan</b>	1995/96	26	154	0	178	2
	1996/97	25	171	0	194	2
	1997/98	24	180	0	202	2

**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**  
**1994/95 - 1996/97 1/**  
**(1,000 METRIC TONS)**  
**TABLE 2: FRESH ORANGES**

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
<b>Mexico</b>					
1995/96	3,590	10	8	3,142	450
1996/97	3,500	11	8	3,103	400
1997/98	4,000	12	9	3,593	410
<b>United States 5/</b>					
1995/96	10,454	23	508	1,538	8,431
1996/97	11,734	30	601	1,865	9,298
1997/98	13,075	30	590	2,115	10,408
<b>Subtotal Other Northern Hemisphere</b>					
1995/96	16,177	191	572	6,752	9,044
1996/97	17,459	224	666	7,147	9,870
1997/98	19,535	242	655	8,137	10,993
<b>Total Northern Hemisphere</b>					
1995/96	25,897	314	3,324	11,932	10,935
1996/97	26,376	374	3,138	12,099	11,513
1997/98	28,883	419	3,460	13,027	12,823
<b>Southern Hemisphere</b>					
<b>Argentina</b>					
1995/96	703	0	91	483	129
1996/97	700	2	90	482	130
1997/98	NA	NA	NA	NA	NA
<b>Australia</b>					
1995/96	543	11	105	209	240
1996/97	544	11	115	220	220
1997/98	NA	NA	NA	NA	NA
<b>Brazil</b>					
1995/96	16,973	0	82	5,589	11,302
1996/97	19,054	0	82	5,712	13,260
1997/98	NA	NA	NA	NA	NA
<b>South Africa 6/</b>					
1995/96	930	0	595	121	214
1996/97	970	75	668	157	220
1997/98	NA	NA	NA	NA	NA
<b>Total Southern Hemisphere</b>					
1995/96	19,149	11	873	6,402	11,885
1996/97	21,268	88	955	6,571	13,830
1997/98	NA	NA	NA	NA	NA
<b>Total World</b>					
1995/96	45,046	325	4,197	18,334	22,820
1996/97	47,644	462	4,093	18,670	25,343
1997/98	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

4/ Tangerine production is small and is included with oranges

5/ Includes Temples

6/ Includes small quantities of tangerines



**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**

**1995/96 - 1997/98 1/**

**(1,000 METRIC TONS)**

**TABLE 3: FRESH TANGERINES**

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
<b>Northern Hemisphere</b>						
<b>Mediterranean Basin</b>						
<b>Egypt</b>	1995/96	256	0	3	250	3
	1996/97	448	0	7	438	3
	1997/98	455	0	10	442	3
<b>Greece</b>	1995/96	71	0	20	49	2
	1996/97	78	0	33	38	7
	1997/98	80	0	35	40	5
<b>Israel</b>	1995/96	125	0	38	42	45
	1996/97	110	0	30	42	38
	1997/98	120	0	35	42	43
<b>Italy</b>	1995/96	528	33	52	449	60
	1996/97	500	43	68	407	68
	1997/98	540	40	80	450	50
<b>Morocco 4/</b>	1995/96	389	0	187	188	14
	1996/97	384	0	190	194	0
	1997/98	420	0	230	190	0
<b>Spain</b>	1995/96	1,686	3	1,112	380	197
	1996/97	1,420	3	1,000	315	108
	1997/98	1,780	2	1,180	400	202
<b>Turkey</b>	1995/96	453	0	120	288	45
	1996/97	450	0	100	305	45
	1997/98	360	0	60	264	36
<b>Subtotal Mediterranean Basin</b>						
	1995/96	3,508	36	1,532	1,646	366
	1996/97	3,390	46	1,428	1,739	269
	1997/98	3,755	42	1,630	1,828	339
<b>Other Northern Hemisphere</b>						
<b>China</b>						
	1995/96	5,509	0	130	5,104	275
	1996/97	5,730	0	135	5,320	275
	1997/98	6,250	0	135	5,840	275
<b>Cuba</b>	1995/96	6	0	0	6	0
	1996/97	6	0	0	6	0
	1997/98	6	0	0	6	0
<b>Japan 5/</b>	1995/96	1,626	4	6	1,450	174
	1996/97	1,428	6	5	1,309	120
	1997/98	1,773	5	6	1,573	199
<b>South Korea</b>	1995/96	615	1	1	568	47
	1996/97	480	1	1	468	12
	1997/98	700	1	2	692	7
<b>Mexico</b>	1995/96	265	0	3	236	26
	1996/97	260	0	3	231	26
	1997/98	270	0	4	240	26

**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**  
**1994/95 - 1996/97 1/**  
**(1,000 METRIC TONS)**  
**TABLE 3: FRESH TANGERINES**

<b>Country/Year 3/ United States 6/</b>	<b>Production</b>	<b>Imports</b>	<b>Exports</b>	<b>Consumption 2/</b>	<b>Processed</b>
1995/96	416	11	22	253	152
1996/97	540	9	23	278	248
1997/98	471	1	23	259	200
<b>Subtotal Other Northern Hemisphere</b>					
1995/96	8,437	16	162	7,617	674
1996/97	8,444	16	167	7,612	681
1997/98	9,470	7	170	8,610	707
<b>Total Northern Hemisphere</b>					
1995/96	11,945	52	1,694	9,263	1,040
1996/97	11,834	62	1,595	9,351	950
1997/98	13,225	49	1,800	10,438	1,046
<b>Southern Hemisphere</b>					
<b>Argentina</b>					
1995/96	336	1	36	253	48
1996/97	360	0	37	293	30
1997/98	NA	NA	NA	NA	NA
<b>Brazil 7/</b>					
1995/96	560	0	8	402	150
1996/97	590	0	8	432	150
1997/98	NA	NA	NA	NA	NA
<b>Total Southern Hemisphere</b>					
1995/96	896	1	44	655	198
1996/97	950	0	45	725	180
1997/98	NA	NA	NA	NA	NA
<b>Total World</b>					
1995/96	12,841	53	1,738	9,918	1,238
1996/97	12,784	62	1,640	10,076	1,130
1997/98	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

4/ Clementines only

5/ Mainly satsumas (also called mandarin or unshu mikan, but also including mandarin hybrids).

6/ Includes tangelos which account for about half of combined tangerine and tangelo production. Export data include mandarins

7/ State of Sao Paulo only, which apparently accounts for over-half of Brazil's production. About 120,000 tons of tangerines, which are processed, are included in the orange table.

**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**  
**1995/96 - 1997/98 1/**  
**(1,000 METRIC TONS)**  
**TABLE 4: FRESH GRAPEFRUIT**

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
<b>Northern Hemisphere</b>						
<b>Mediterranean Basin</b>						
<b>Cyprus</b>						
	1995/96	108	0	60	10	38
	1996/97	90	0	50	10	30
	1997/98	80	0	40	10	30
<b>Gaza</b>						
	1995/96	6	0	4	2	0
	1996/97	6	0	4	2	0
	1997/98	6	0	4	2	0
<b>Israel</b>						
	1995/96	385	5	107	25	258
	1996/97	405	5	127	25	258
	1997/98	352	5	70	0	0
<b>Italy</b>						
	1995/96	4	38	5	37	0
	1996/97	3	35	3	35	0
	1997/98	0	0	0	0	0
<b>Turkey</b>						
	1995/96	65	1	42	17	7
	1996/97	65	0	40	18	7
	1997/98	55	5	35	19	6
<b>Subtotal Mediterranean Basin</b>						
	1995/96	568	44	218	91	303
	1996/97	569	40	224	90	295
	1997/98	493	10	149	31	36
<b>Other Northern Hemisphere</b>						
<b>Cuba</b>						
	1995/96	250	0	65	75	110
	1996/97	230	0	55	70	105
	1997/98	230	0	55	70	105
<b>Japan</b>						
	1995/96	0	275	0	275	0
	1996/97	0	281	0	281	0
	1997/98	0	285	0	285	0
<b>Mexico</b>						
	1995/96	245	1	3	203	40
	1996/97	230	1	3	192	36
	1997/98	245	1	4	202	40
<b>United States</b>						
	1995/96	2,466	15	500	699	1,282
	1996/97	2,620	13	480	757	1,396
	1997/98	2,485	15	440	810	1,250
<b>Subtotal Other Northern Hemisphere</b>						
	1995/96	2,961	291	568	1,252	1,432
	1996/97	3,080	295	538	1,300	1,537
	1997/98	2,960	301	499	1,367	1,395
<b>Total Northern Hemisphere</b>						
	1995/96	3,529	335	786	1,343	1,735
	1996/97	3,649	335	762	1,390	1,832
	1997/98	3,453	311	648	1,398	1,431

**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**

**1995/96 - 1997/98 1/**

**(1,000 METRIC TONS)**

**TABLE4 : FRESH GRAPEFRUIT**

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
<b>Southern Hemisphere</b>					
<b>Argentina</b>					
1995/96	216	8	34	157	33
1996/97	200	8	30	153	25
1997/98	NA	NA	NA	NA	NA
<b>South Africa</b>					
1995/96	172	0	115	14	43
1996/97	177	40	105	62	50
1997/98	NA	NA	NA	NA	NA
<b>Total Southern Hemisphere</b>					
1995/96	388	8	149	171	76
1996/97	377	48	135	215	75
1997/98	NA	NA	NA	NA	NA
<b>Total World</b>					
1995/96	3,917	343	935	1,514	1,811
1996/97	4,026	383	897	1,605	1,907
1997/98	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.



**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**

**1995/96 - 1997/98 1/**

**(1,000 METRIC TONS)**

**TABLE 5: FRESH LEMONS**

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
<b>Northern Hemisphere</b>					
<b>Mediterranean Basin</b>					
<b>Cyprus</b>					
1994/95	38	0	27	6	5
1995/96	33	0	20	8	5
1996/97	25	0	10	8	7
<b>Gaza</b>					
1994/95	10	0	9	1	0
1995/96	5	0	4	1	0
1996/97	5	0	4	0	0
<b>Greece</b>					
1994/95	140	8	60	76	12
1995/96	150	7	49	77	31
1996/97	150	7	50	77	30
<b>Israel</b>					
1994/95	20	3	3	18	2
1995/96	17	6	3	18	2
1996/97	20	3	3	18	2
<b>Italy</b>					
1994/95	699	9	52	326	330
1995/96	714	16	31	379	320
1996/97	600	15	30	285	300
<b>Morocco</b>					
1994/95	20	0	0	20	0
1995/96	22	0	0	22	0
1996/97	20	0	0	20	0
<b>Spain</b>					
1994/95	457	26	333	70	80
1995/96	448	24	365	50	57
1996/97	619	5	454	75	95
<b>Turkey</b>					
1994/95	418	0	123	253	42
1995/96	380	0	80	262	38
1996/97	250	50	60	210	30
<b>Subtotal Mediterranean Basin</b>					
1995/96	1802	46	607	770	471
1996/97	1769	53	552	817	453
1997/98	1689	80	611	693	464
<b>Other Northern Hemisphere</b>					
<b>Japan</b>					
1995/96	2	94	0	96	0
1996/97	2	94	0	96	0
1997/98	0	0	0	0	0
<b>Mexico</b>					
1995/96	11	1	0	1	11
1996/97	20	1	0	1	20
1997/98	20	1	0	1	20
<b>United States</b>					
1995/96	900	11	120	359	432
1996/97	779	14	121	305	367
1997/98	848	12	120	340	400

**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**

**1995/96 - 1997/98 1/  
(1,000 METRIC TONS)  
TABLE 5: FRESH LEMONS**

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
<b>Subtotal Other Northern Hemisphere</b>					
1995/96	913	106	120	456	443
1996/97	801	109	121	402	387
1997/98	868	13	120	341	420
<b>Total Northern Hemisphere</b>					
1995/96	2715	152	727	1226	914
1996/97	2570	162	673	1219	840
1997/98	2557	93	731	1034	884
<b>Southern Hemisphere</b>					
<b>Argentina</b>					
1995/96	720	3	165	98	460
1996/97	800	0	165	125	510
1997/98	NA	NA	NA	NA	NA
<b>Australia</b>					
1995/96	38	2	2	20	18
1996/97	35	2	5	17	15
1997/98	NA	NA	NA	NA	NA
<b>Brazil 4/</b>					
1995/96	70	0	1	0	69
1996/97	73	0	1	0	72
1997/98	NA	NA	NA	NA	NA
<b>South Africa</b>					
1995/96	71	0	43	7	21
1996/97	74	0	44	8	22
1997/98	NA	NA	NA	NA	NA
<b>Total Southern Hemisphere</b>					
1995/96	899	5	211	125	568
1996/97	982	2	215	150	619
1997/98	NA	NA	NA	NA	NA
<b>Total World</b>					
1995/96	3614	157	938	1351	1482
1996/97	3552	164	888	1369	1459
1997/98	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of lemons usually begins earlier and often extends throughout the year.

4/ State of Sao Paulo only.

**FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES**

1994/95 - 1996/97 1/

(1,000 METRIC TONS)

**TABLE 6: OTHER CITRUS**

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
<b>Northern Hemisphere</b>					
<b>Mediterranean Basin</b>					
<b>Egypt 4/</b>					
1995/96	334	0	9	318	7
1996/97	310	0	11	291	8
1997/98	350	0	12	328	10
<b>Israel</b>					
1995/96	40	0	10	13	17
1996/97	40	0	10	13	17
1997/98	0	0	0	0	0
<b>Italy 5/</b>					
1995/96	14	0	0	0	14
1996/97	14	0	0	0	14
1997/98	10	0	0	0	10
<b>Morocco</b>					
1995/96	14	0	1	13	0
1996/97	14	0	0	14	0
1997/98	10	0	0	10	0
<b>Spain 6/</b>					
1995/96	14	0	1	0	13
1996/97	12	0	2	0	10
1997/98	15	0	3	0	12
<b>Subtotal Mediterranean Basin</b>					
1995/96	416	0	21	344	51
1996/97	390	0	23	318	49
1997/98	385	0	15	338	32
<b>Other Northern Hemisphere</b>					
<b>Cuba 4/</b>					
1995/96	14	0	0	12	2
1996/97	14	0	0	12	2
1997/98	0	0	0	0	0
<b>Japan 7/</b>					
1995/96	110	0	0	107	3
1996/97	99	0	0	96	3
1997/98	107	0	0	104	3
<b>Mexico 8/</b>					
1995/96	917	2	149	630	140
1996/97	940	2	150	650	142
1997/98	965	2	155	670	142
<b>United States 8/</b>					
1995/96	12	133	2	141	2
1996/97	15	132	2	143	2
1997/98	17	130	2	143	2
<b>Subtotal Other Northern Hemisphere</b>					
1995/96	1,053	135	151	890	147
1996/97	1,068	134	152	901	149
1997/98	1,089	132	157	917	147
<b>Total Northern Hemisphere</b>					
1995/96	1,469	135	172	1,234	198
1996/97	1,458	134	175	1,219	198
1997/98	1,474	132	172	1,255	179

# FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES

1995/96 - 1997/98 1/

(1,000 METRIC TONS)

TABLE 6: OTHER CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
<b>Southern Hemisphere</b>					
<b>Brazil 9/</b>					
1995/96	656	0	0	610	46
1996/97	670	0	0	624	46
1997/98	NA	NA	NA	NA	NA
<b>Total Southern Hemisphere</b>					
1995/96	656	0	0	610	46
1996/97	670	0	0	624	46
1997/98	NA	NA	NA	NA	NA
<b>Total World</b>					
1995/96	2,125	135	172	1,844	244
1996/97	2,128	134	175	1,843	244
1997/98	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of limes usually begins earlier and often extends throughout the year.

4/ Mostly limes but some sour oranges and other varieties.

5/ Mostly bergamots.

6/ Sour oranges.

7/ Summer oranges (Natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo).

8/ Limes

9/ Limes, states of Sao Paulo only, which apparently accounts for roughly 80 percent of Brazil's lime production.



## AVOCADO SITUATION IN SELECTED COUNTRIES

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Avocado production in selected countries is forecast to increase 3 percent in 1997/98 to a record 1.27 million metric tons. Selected country avocado exports in 1997/98 are forecast at a record 218,000 tons, 8 percent above the previous year's shipments. Increased exports from Spain, South Africa, and Mexico will likely more than offset lower exports from Israel. U.S. exports in 1997/98 are forecast to approximate the previous year's level. U.S. avocado imports in 1997/98 are forecast at 37,000 tons, 36 percent above the previous year's imports, based on expected higher imports from Mexico.

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### Chile

Avocado production for the 1997/98 season (January-December 1998) is forecast at a record 55,000 tons, up 8 percent from the 1996/97 output, due to a large number of orchards reaching bearing age. Production is projected to surpass 95,000 tons by the year 2000, with the Hass variety comprising approximately 70,000 tons of the total. The Hass variety currently accounts for over 55 percent of all avocado production in Chile. The expected increase is based on increased plantings due to high producer prices during the past few years and favorable export opportunities.

Chilean avocado exports in 1997/98 are forecast to increase by 3 percent to 18,000 tons. The United States continues to be Chile's largest export market, making up 97 percent of total exports (1996). However, the avocado producers have been attempting to diversify markets. Since Mexican avocados are permitted access to the U.S. market from November to February, the strategy of Chilean exporters appears to be to export most of their avocados before November 1. In addition, Chilean promotional campaigns aimed at the domestic market and Argentina have continued this past year. Chilean producers and exporters contribute U.S. \$.01 per kilogram exported towards foreign market promotional campaigns. The Chileans also believe that they can export

more avocados to Europe. Good international prices have helped improve export opportunities.

Consumption in 1997/98 is forecast at 37,000 tons, 11 percent above the previous year's revised estimate. Larger supplies and promotional campaigns contributed to the increase. The majority of avocados consumed domestically are non-Hass varieties and Hass avocados that are unsuitable for export.

The Chilean Government does not provide direct subsidies or special tax incentives for avocado production. Avocados and other fruits and vegetables do benefit from the recently created Export Promotion Fund for agricultural products.

### Israel

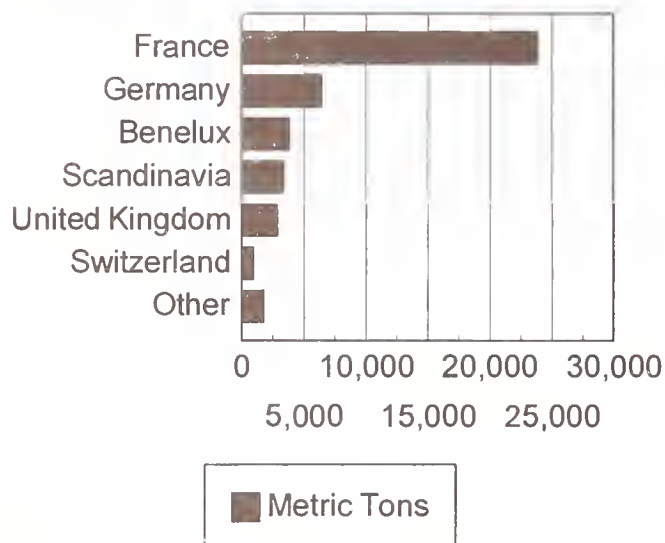
Avocado production in 1997/98 (October/September) is forecast at 80,000 tons, down 6 percent from 1996/97 because of scarce water supplies.

#### Israel's exports expected to fall in 1997/98

Exports from Israel are forecast to decrease 9 percent to 50,000 tons in 1997/98 due to lower domestic production. France remains Israel's largest export market, accounting for over 50 percent of total exports. Israel has increasingly diversified its markets. Germany,

the second largest export market, now purchases about 15 percent of Israel's avocado exports. Other important European customers include the United Kingdom, Scandinavia, Belgium-Luxembourg, Switzerland and Italy. Spain and Mexico are Israel's primary competition in the European markets, although Mexican avocados are reported to be at much higher prices this year. South African avocados also compete in Europe beginning around April.

### Israeli Fresh Avocado Exports - 1996



Source: U.S. Agricultural Attache Reports

### Japan

#### Volatile regional economy and strong U.S. dollar temper avocado imports in 1997

Avocados, which are not produced domestically, were introduced to Japan in the early 1970's. Because of Japan's strong domestic demand and despite less favorable exchange rates of the dollar against the yen, Japan continues to be a desirable market for the sale of quality fruit.

However, consumption is forecast to decrease 29 percent in 1997, due to higher prices influenced by a stronger dollar and a more volatile economy in the region, generally. Currently, only the Hass variety is marketed to Japan. The United States and Mexico are currently the only suppliers of avocados to Japan.

Mexico's weaker peso and lower avocado prices have significantly helped to increase Mexican market share in Japan. Larger volumes of early season Mexican avocados in July and August are increasingly competing with U.S. avocados, where they did not compete in the past. In addition, Mexican avocados have improved in quality recently and are favored by a lower rate of import duty (4.5 percent for the United States compared to 3 percent for Mexico) on a CIF basis due to Mexico's status under the Generalized System of Preferences.

Challenges for expanding consumption in the future in Japan will be to further educate the Japanese consumer and local handlers (especially regional distributors outside the big cities) on the health benefits of avocados, and when to deliver, eat, and how to use them. In-store promotions and menu presentations at the beginning of the U.S. avocado season have been successful and are considered very important to traders. At present, most avocados in Japan are sold at the retail level and are prepared either plain or in salad plates with vegetables. In addition, the industry plans to promote the use of avocados on hamburger sandwiches at chain restaurants.

Currently 80 percent of avocados in Japan are consumed in the Tokyo, Osaka, and Nagoya areas. Avocado use in the food service industry including restaurants and hotels, is still limited (about 20 percent) but has promising potential for the future. Marketers are concentrating on menu presentations of health-oriented avocado dishes in family and fast-food restaurants.

The Japanese prefer the larger size 24 avocados which constitute over 80 percent of avocados on the market, but U.S. avocados of this size were reportedly in short supply last year. Prices in 1997 of California 24's were approximately 2,300 yen per tray, wholesale, and 120 to 180 yen per fruit, retail. Mexican avocados ranged from 1,800 to 2,000 yen per tray and 100 to 120 yen per fruit.

## **Mexico**

### **Avocado output to rise sharply in 1997/98**

Mexico remains the world's largest producer of avocados. The 1997/98 crop (harvested August 1997 through July 1998) is forecast at 865,000 tons, up 3 percent from the revised 1996/97 estimate because of favorable weather and normal water supplies during the growing season of the Michoacan crop.

The area planted to avocados in 1997/98 is forecast at 95,000 hectares, up 3 percent from the previous year; harvested area is also forecast up 3 percent, to 93,000 hectares. This increase is based on smaller growers returning to their orchards and additional trees coming into production. Given the significant number of new trees planted in the late-1980's and early-1990's, some sources expect total production to expand between 1998 and the year 2000 as trees reach full maturity. Avocados are also grown in the states of Nayarit, Puebla, Morelos, and Mexico.

The average farmgate price for export-quality fruit was estimated at about 1,200 pesos per ton (US\$156 per ton) for the peak season (November through April) in 1996/97. During the off season (May through September), growers received over 2,500 pesos per ton (US\$325 per ton). Growers expect prices to remain near these levels in 1997/98 and will likely be influenced by increased exports. In addition, total production costs have remained fairly stable this year.

### **Mexican avocado exports reach record levels in 1996/97**

On January 31, 1997, the Animal Plant Health Inspection Service (APHIS) of the U.S. Department of Agriculture approved the import of Mexican Hass avocados from Michoacan state to be imported into 19 northeastern U.S. states and the District of Columbia during the months of November, December, January and February, provided growers meet pest-control requirements.

APHIS approval requires strict compliance with phytosanitary procedures and standards as well

as passing a series of APHIS inspections during the growing, packing, and exporting processes.

Avocado exports in 1997/98 are forecast at a record 81,000 tons, a 19 percent increase. Increased production and the partial opening of the U.S. market are primary factors for the expected increase.

Mexico continues to export processed avocados to the U.S. market, however apparently at a decreasing rate. Processed products include guacamole, paste and avocado oil. In 1996/97, exports of processed avocados decreased 13 percent to 13,034 tons. Because of the strong demand and higher prices obtained for fresh avocados in the United States and other countries, exports of processed avocados are likely to level off until more lower-priced avocados are available for processing.

The vast majority of avocado production in Mexico is sold to the fresh domestic market. Exports of avocados currently account for only about 8 percent of production. Europe (especially France), Canada, Japan, and most recently, Central America, are Mexico's largest export markets. The United States also imports avocados from Mexico and has the potential to soon become a major market now that the phytosanitary ban has been partially lifted.

SAGAR, the Mexican inspection agency, recently published a new phytosanitary regulation in order to establish phytosanitary requirements and procedures for transporting fresh avocados within Mexico. The goal of this action is to facilitate exports by protecting the major growing regions from pest infestations.

Although Mexico permits the import of avocados, because of current prices and the peso devaluation, avocado imports are not generally competitive in Mexico. Mexico maintains its 20 percent tax on imports of avocados with the exception of the United States, where under NAFTA regulations there is a mutual tariff of approximately 7.92 cents/Kg in 1995. This tariff (08.04.40.01) will be phased out over 10 years by 2004. Imported avocados are also subject to phytosanitary and other inspections by SAGAR.



## **South Africa**

The 1997/98 (November/October) avocado crop is forecast at a record 53,000 tons, up 11 percent from 1996/97. Rains during the early summer provided adequate water supplies, while dry weather later in the season is expected to improve the overall quality of the fruit.

The majority of South African avocados are exported. In 1996/97 exports totaled 24,793 tons, 9 percent below the previous year. This was largely due to the lower availability of export quality fruit. In 1997/98 exports are forecast to increase 17 percent to 29,000 tons, due to the expected larger harvest. Practically all of South Africa's avocado exports go to the EU.

Domestic consumption of avocados in 1997/98 is forecast to rise modestly by 4 percent to 24,000 tons. Approximately 30 percent of the crop is consumed domestically.

### **South Africans hope to reach tariff agreement with the EU in 1998**

The South Africans are continuing negotiations with the EU for a zero percent tariff rate and hope to reach an agreement in 1998. A reduction from 4 to 3.5 percent (December to May) and from 8 to 6 percent (June to November) was granted last year under the General System of Preferences (GSP).

## **Spain**

Avocado production 1997/98 (July/June) is forecast at 45,000 tons, 13 percent above last year's output because of excellent growing conditions and maturing orchards. Although avocados are harvested October through June, the bulk of the crop is harvested between November and January.

The primary avocado varieties grown in Spain are the Hass, Bacon, and Fuerte. Hass accounts for almost 80 percent of the total production.

## **Export prospects improve in 1997/98**

Exports in 1997/98 are forecast to rise 14 percent to 36,000 tons due to the expected larger harvest. Spain exports primarily to EU countries with France taking about 70 percent of the total. The remainder is exported to Scandinavia and Switzerland. Less competition from Israel for sales to the EU are expected this year because of Israel's lower export forecast. Spain and Israel ship during the same export season.

## **Dominican Republic**

Commercial avocado production in 1997 (calendar year) is forecast at 12,000 tons, down 8 percent from 1996 because of extended drought conditions. Fruit quality has reportedly suffered as a result of the weather problems. Production for export quality fruit primarily occurs in the Mao and Bani areas. The Dominican Republic is the second largest exporter of avocados to the United States, after Chile.

In 1996/97 (November/October) Dominican avocado exports to the United States rose 12 percent to a record 6,860 tons. They are marketed mostly in New York, Puerto Rico, and Miami. Dominican avocados enter the United States duty free under the Caribbean Basin Economic Recovery Act. The remainder of exports are largely sent to the European Union including to Belgium-Luxemburg, Germany, the Netherlands, France and Italy.

## **United States**

Preliminary assessments for 1997/98 indicate production could approximate 170,000 tons, as the previous year's output. Avocados are harvested year-round in California, which accounts for approximately 85-90 percent of total U.S. production. The main harvest in Florida runs from July through February. The official 1997/98 estimate of U.S. avocado production will be available from USDA's National Agricultural Statistics Service (NASS) in July 1998.



## U.S. exports fall sharply

U.S. exports of avocados totaled 5,001 tons in 1996/97, 47 percent below the previous year's level. Higher prices in foreign markets influenced by a stronger dollar and increased domestic demand discouraged exports. The Netherlands and Japan, the largest markets last year, reduced their imports of U.S. avocados by 70 and 34 percent, respectively. This year Canada increased imports by 18 percent or 1,304 tons, accounting for 26 percent of total U.S. exports. Exports to Hong Kong, a smaller targeted market, also increased this season by 81 percent.

Exports in 1997/98 are forecast to be similar to the previous year's level, but could increase if supplies are higher and more favorable exchange rates occur and the industry expands in markets where Mexico's exports may be lower due to increased exports to the United States.

U.S. avocado imports increased markedly in 1996/97 to 27,177 tons, up 28 percent above the previous year. Most of the imports came from Chile, over 17,451 tons or 64 percent, and the Dominican Republic, 6,860 tons or 25 percent of the import total. Total U.S. imports in 1997/98 are likely to increase to 37,000 tons, based on expected higher imports from Mexico.

The United States imports Mexican processed avocados. In 1996/97 imports decreased 13 percent to 13,034 tons. Higher prices for fresh avocados and growing demand in the United States and other countries indicate that imports of processed avocado are likely to level off until greater supplies are available.

U.S. consumption of avocados has kept pace with U.S. production in recent years. Current data indicates U.S. demand for avocados will continue growing. Supplemented by avocado imports, U.S. consumption in 1996/97 increased 7 percent to 193,301 tons. In 1997/98 consumption may exceed 200,000 tons, assuming the supply from the U.S. crop and imports is sufficient. The nation's growing interest in health oriented and specialty, gourmet foods appears to signify a future of opportunities for avocados in the United States.

## U.S. Exports of Fresh Avocado 1996/97

Marketing Year (November/October)



Metric Tons



Source: U.S. Bureau of the Census

*(For further information on avocado production, supply, distribution, and trade, contact Stephanie Riddick, 202-720-9792. For information on marketing contact Steve Shnitzler, 202-720-8495.)*

**AVOCADOS: PRODUCTION, SUPPLY, AND DISTRIBUTION**  
**(Metric Tons)**  
**Marketing Years 1994/95 - 1996/97**

Country/ Marketing Year 1/	Production	Imports	Total Supply	Exports	Domestic Consumption	Total Distribution
<b>Chile</b>						
1994/95	48,000	0	48,000	12,000	36,000	48,000
1995/96	51,200	0	51,200	16,700	34,500	51,200
1996/97	51,000	0	51,000	17,500	33,500	51,000
1997/98 F	55,000	0	55,000	18,000	37,000	55,000
<b>Israel</b>						
1994/95	58,000	0	58,000	36,000	22,000	58,000
1995/96	78,000	0	78,000	49,000	29,000	78,000
1996/97	85,000	0	85,000	55,000	30,000	85,000
1997/98 F	80,000	0	80,000	50,000	30,000	80,000
<b>Japan</b>						
1994/95	0	3,740	3,740	0	3,740	3,740
1995/96	0	4,725	4,725	0	4,725	4,725
1996/97	0	6,453	6,453	0	6,453	6,453
1997/98 3/	0	4,600	4,600	0	4,600	4,600
<b>Mexico</b>						
1994/95	799,000	0	799,000	26,000	773,000	799,000
1995/96	790,000	0	790,000	44,000	746,000	790,000
1996/97	838,000	0	838,000	68,000	770,000	838,000
1997/98 F	865,000	0	865,000	80,000	785,000	865,000
<b>South Africa</b>						
1994/95	48,150	5	48,155	28,400	19,750	48,150
1995/96	48,800	0	48,800	27,417	21,383	48,800
1996/97	47,800	0	47,800	24,793	23,007	47,800
1997/98 F	53,000	0	53,000	29,000	24,000	53,000
<b>Spain</b>						
1994/95	35,100	2,150	37,250	26,500	10,750	37,250
1995/96	40,000	2,700	42,700	31,500	11,200	42,700
1996/97	40,000	3,331	43,331	31,831	11,500	43,331
1997/98 F	45,000	3,000	48,000	36,000	12,000	48,000
<b>TOTAL FOREIGN</b>						
1994/95	988,250	5,895	994,145	128,900	865,240	994,140
1995/96	1,008,000	7,425	1,015,425	168,617	846,808	1,015,425
1996/97	1,061,800	9,784	1,071,584	197,124	874,460	1,071,584
1997/98 F	1,098,000	7,600	1,105,600	213,000	892,600	1,105,600
<b>United States</b>						
1994/95	159,900	22,299	182,199	13,380	168,819	182,199
1995/96	168,100	21,175	189,275	9,444	179,831	189,275
1996/97	171,186	27,116	198,302	5,001	193,301	198,302
1997/98 F	170,000	37,000	207,000	5,000	202,000	207,000
<b>GRAND TOTAL</b>						
1994/95	1,148,150	28,194	1,176,344	142,280	1,034,059	1,176,339
1995/96	1,176,100	28,600	1,204,700	178,061	1,026,639	1,204,700
1996/97	1,232,986	36,900	1,269,886	202,125	1,067,761	1,269,886
1997/98 F	1,268,000	44,600	1,312,600	218,000	1,094,600	1,312,600

1/ Marketing Years: Israel - October/September; Chile, Japan and South Africa - Calendar Year of the second year shown; Mexico - August/July; Spain - July/June; United States - November/October.  
Sources: Reports from U.S. Agricultural Attaches. USDA/NASS estimates. U.S. Department of Commerce.  
3/ Japan - Jan. to Sept. F - Forecast

**U.S. EXPORTS OF AVOCADOS**  
**MARKETING YEARS (November/October) 1992/93-1996/97**  
**METRIC TONS**

Destination	1992/93	1993/94	1994/95	1995/96	1996/97
<b>North America</b>					
Canada	5,299	1,985	1,941	1,101	1,304
Mexico	16	0	14	13	10
<b>Subtotal</b>	5,315	1,985	1,955	1,114	1,314
<b>European Union</b>					
Sweden	376	226	507	364	39
United Kingdom	1,897	877	1,360	884	346
Netherlands	482	1,411	2,052	3,875	1,151
France	2,928	2,195	5,207	233	104
Germany	4	79	6	19	21
Spain	132	20	23	67	20
Other	53	112	19	0	33
<b>Subtotal</b>	5,872	4,920	9,174	5,442	1,714
<b>Asia</b>					
Singapore	0	28	0	1	2
Korea, Republic of	4	56	26	93	88
Hong Kong	3	71	61	44	80
Taiwan	67	0	0	1	3
Japan	3,310	1,940	2,086	2,719	1,784
<b>Subtotal</b>	3,384	2,095	2,173	2,858	1,957
<b>Other Countries</b>	31	15	78	30	16
<b>Grand Total</b>	14,602	9,015	13,380	9,444	5,001

Source: U.S. Bureau of the Census

**U.S. IMPORTS OF AVOCADOS**  
**MARKETING YEARS (November/October) 1991/92-1996/97**  
**METRIC TONS**

Destination	1991/92	1992/93	1993/94	1994/95	1995/96	1996/97
Mexico	807	541	718	484	1,703	1,909
Italy	59	0	0	0	0	0
Bahamas, The	60	315	468	246	355	688
Jamaica & Dep.	2	15	0	2	0	0
Haiti	0	2	0	0	0	0
Dominican Republic	5,783	6,011	4,648	5,808	6,118	6,860
Chile	16,807	5,570	12,040	15,526	12,911	17,451
Other Countries	17	2	0	232	88	208
<b>Grand Total</b>	<b>23,535</b>	<b>12,456</b>	<b>17,874</b>	<b>22,298</b>	<b>21,175</b>	<b>27,116</b>

Source: U.S. Bureau of the Census

**U.S. IMPORTS OF PREPARED AVOCADOS**  
**MARKETING YEARS (November/October) 1991/92-1996/97**  
**METRIC TONS**

Destination	1991/92	1992/93	1993/94	1994/95	1995/96	1996/97
Mexico	5,331	5,798	10,031	15,121	14,899	13,016
Costa Rica	0	0	0	14	0	0
Honduras	0	0	0	0	0	0
Israel	5	0	0	0	0	0
South Africa, Repub.	0	7	0	12	8	0
Phillipines	1	0	0	2	2	18
France	0	0	0	0	18	0
<b>Grand Total</b>	<b>5,337</b>	<b>5,805</b>	<b>10,031</b>	<b>15,149</b>	<b>14,927</b>	<b>13,034</b>

Source: U.S. Bureau of the Census



U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country	Nov	Nov	Oct-Nov	Oct-Nov	Oct-Sep	Nov	Nov	Oct-Nov	Oct-Nov	Oct-Sep	
Region	FY 1996	FY 1997	FY 1996	FY 1997	FY 1996	FY 1996	FY 1997	FY 1996	FY 1997	FY 1996	
<b>Fresh Apples MT</b>											
Canada	6,578	8,977	14,324	16,821	88,955	4,934	6,233	10,584	11,872	63,812	
Mexico	1,774	201	2,757	623	93,537	846	122	1,261	347	46,524	
Indonesia	3,305	3,080	8,570	4,259	73,491	2,313	1,918	5,888	2,660	42,923	
Hong Kong	3,781	2,937	7,366	6,212	46,878	2,311	1,871	4,600	3,826	27,052	
Taiwan	23,536	11,695	43,443	35,115	113,819	15,785	7,219	27,847	23,541	74,674	
Other Countries	53,431	45,142	82,009	62,183	273,069	29,316	24,441	45,303	34,157	157,386	
Subtotal:-----	92,405	72,032	158,470	125,214	689,749	55,504	41,803	95,483	76,402	412,371	
<b>Fresh Pears MT</b>											
European Union	2,415	6,846	3,162	8,441	7,471	1,177	2,964	1,510	3,755	3,539	
Canada	4,972	5,814	11,002	15,403	40,526	4,480	3,971	9,302	9,221	30,807	
Mexico	2,379	2,989	6,302	6,763	34,021	1,162	1,486	3,179	3,387	16,380	
Brazil	3,526	8,174	15,970	14,908	19,378	1,531	3,062	6,803	6,175	8,660	
Taiwan	1,566	274	2,356	1,248	5,215	1,126	129	1,619	567	3,207	
Other Countries	4,326	5,859	7,895	9,574	19,798	2,711	3,223	4,989	5,281	13,460	
Subtotal:-----	19,185	29,955	46,687	56,336	126,409	12,187	14,835	27,402	28,386	76,052	
<b>Fresh Apricots MT</b>											
European Union	0	0	1	0	286	0	0	19	0	408	
Canada	11	13	11	13	4,366	12	20	12	20	4,597	
Mexico	4	44	52	44	1,224	3	34	46	34	986	
Taiwan	0	70	0	472	372	0	86	0	493	394	
Japan	0	0	0	15	85	0	0	0	29	97	
Other Countries	0	94	39	109	271	0	67	24	75	256	
Subtotal:-----	15	222	104	653	6,604	15	207	101	651	6,738	
<b>Fresh Cherries MT</b>											
European Union	0	560	314	1,165	10,369	0	435	318	913	21,988	
Canada	21	15	21	29	7,263	45	34	45	60	17,824	
Hong Kong	0	36	0	36	2,764	0	22	0	22	6,989	
Taiwan	11	18	11	103	4,917	50	40	50	437	15,536	
Japan	0	0	2	70	13,003	0	0	17	307	74,257	
Other Countries	11	36	27	55	1,085	42	89	99	132	3,548	
Subtotal:-----	43	665	375	1,458	39,400	138	621	529	1,871	140,144	
<b>Fresh Peach/Nect MT</b>											
Canada	68	46	446	449	51,869	99	57	512	468	44,366	
Mexico	222	379	1,210	2,096	15,270	114	220	692	1,247	7,451	
Brazil	31	0	58	0	843	31	0	56	0	713	
Hong Kong	28	85	43	126	3,668	24	53	35	94	2,817	
Taiwan	0	35	15	102	26,329	0	72	25	198	32,499	
Other Countries	44	7	204	145	5,366	57	8	266	137	4,892	
Subtotal:-----	393	551	1,976	2,918	103,345	325	411	1,586	2,144	92,737	
<b>Fr. Plums/Prunes MT</b>											
Canada	2	28	279	810	25,023	9	46	337	803	21,232	
Mexico	111	45	528	360	4,796	52	28	309	240	2,862	
Malaysia	0	26	2	35	1,675	0	34	3	42	1,281	
Hong Kong	0	10	285	103	12,147	0	12	290	152	11,067	
Taiwan	15	51	75	139	20,835	30	55	74	147	18,123	
Other Countries	157	248	633	852	7,430	269	192	733	786	6,659	
Subtotal:-----	286	408	1,802	2,298	71,906	360	367	1,746	2,170	61,224	
<b>Fr. Avocados MT</b>											
European Union	507	38	1,292	38	2,501	313	86	960	86	2,817	
Canada	123	193	212	271	1,316	117	219	197	296	1,518	
Korea, Republic o	5	2	27	21	91	10	3	52	33	175	
Hong Kong	0	0	0	0	80	0	0	0	0	135	
Japan	5	0	5	0	1,784	3	0	3	0	3,473	
Other Countries	1	7	21	10	48	3	17	13	20	96	
Subtotal:-----	639	239	1,556	339	5,819	447	325	1,225	435	8,215	
<b>Fr. Kiwifruit MT</b>											
Canada	419	718	747	1,281	3,246	402	588	773	1,137	3,449	
Mexico	1	38	1	62	303	12	33	12	51	268	
Russian Federatio	0	0	0	0	71	0	0	0	0	70	
Korea, Republic o	149	0	223	0	1,558	270	0	390	0	2,787	
Hong Kong	0	0	0	0	213	0	0	0	0	383	
Other Countries	3	63	5	85	47	16	101	24	128	79	
Subtotal:-----	572	819	976	1,428	5,438	700	722	1,199	1,316	7,036	
<b>Fresh Grapes MT</b>											
Canada	5,247	7,346	18,947	22,122	91,966	10,366	12,224	28,583	31,229	116,808	
Mexico	2,447	5,254	5,309	10,070	12,706	2,442	4,625	5,175	8,948	12,752	
Philippines	4,472	7,304	6,353	9,708	12,592	6,578	7,553	9,065	10,332	16,740	
Hong Kong	2,655	8,987	10,771	16,147	47,881	4,670	11,766	17,325	20,715	65,970	
Taiwan	1,395	445	5,476	2,405	15,107	1,760	587	6,858	2,831	18,995	
Other Countries	11,085	16,451	21,085	26,613	53,305	17,627	21,350	33,380	35,902	78,463	
Subtotal:-----	27,302	45,788	67,941	87,065	233,558	43,443	58,106	100,386	109,957	309,727	

U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	
Fresh Strawberries MT											
European Union	41	173	343	454	3,622	154	451	1,028	1,175	9,212	
Canada	242	748	2,296	2,086	39,978	595	1,116	2,855	3,355	57,300	
Mexico	19	7	136	290	1,354	12	7	253	548	2,310	
Thailand	0	0	0	0	288	0	0	0	0	511	
Japan	696	614	2,084	2,113	6,858	2,383	2,282	7,996	8,018	26,262	
Other Countries	22	29	62	101	514	75	66	158	171	1,414	
Subtotal:----	1,020	1,571	4,921	5,044	52,615	3,219	3,922	12,291	13,266	97,010	
Fresh Oranges Inc Tmpl MT											
Canada	17,409	15,576	22,954	23,282	198,847	9,033	7,623	12,217	11,471	102,434	
Malaysia	280	193	288	259	21,343	162	90	166	125	11,689	
Korea, Republic o	232	83	393	463	31,760	258	83	442	421	20,739	
Hong Kong	2,104	7,784	6,464	18,156	133,150	1,096	4,770	3,620	11,421	75,655	
Japan	3,985	5,792	4,154	7,189	123,521	3,072	3,979	3,230	5,419	69,023	
Other Countries	3,605	3,534	4,351	5,113	81,807	2,250	1,946	2,709	2,883	43,663	
Subtotal:----	27,615	32,962	38,605	54,461	590,428	15,871	18,491	22,384	31,740	323,203	
Fresh Grapefruit MT											
European Union	19,274	18,941	32,096	37,716	140,246	8,155	7,410	13,550	15,360	60,956	
Canada	7,253	7,450	16,256	14,893	74,982	2,803	2,927	6,567	5,903	29,244	
Hong Kong	515	379	1,581	759	7,587	266	140	867	410	4,319	
Taiwan	910	35	945	35	26,174	563	29	592	29	11,711	
Japan	12,258	11,181	22,357	16,659	221,912	8,104	6,136	14,668	9,576	124,930	
Other Countries	1,231	735	1,932	1,415	13,501	2,261	456	2,692	820	9,247	
Subtotal:----	41,441	38,721	75,165	71,478	484,403	22,153	17,098	38,936	32,099	240,408	
Canned Peaches MT											
Canada	409	720	845	1,423	4,954	453	654	999	1,243	5,297	
Russian Federatio	0	162	142	269	1,278	0	120	134	200	1,068	
Korea, Republic o	55	155	284	183	1,508	50	99	246	124	1,164	
Taiwan	99	90	168	119	1,249	76	96	142	127	1,013	
Japan	193	269	413	502	2,837	196	379	432	617	3,078	
Other Countries	387	433	1,434	1,004	5,047	346	492	1,405	1,143	4,907	
Subtotal:----	1,144	1,827	3,287	3,500	16,873	1,121	1,839	3,357	3,454	16,528	
Fresh Lemons MT											
European Union	32	215	32	215	1,184	25	118	25	118	926	
Canada	2,095	2,271	4,079	3,262	22,736	1,482	1,208	3,038	1,827	15,242	
Korea, Republic o	222	266	424	473	3,877	209	225	440	499	3,810	
Hong Kong	857	1,637	1,809	2,541	8,744	492	1,127	1,087	1,864	6,070	
Japan	9,108	5,548	15,347	14,467	79,266	12,245	5,794	18,833	19,592	91,439	
Other Countries	664	906	832	1,146	4,472	489	640	634	844	3,169	
Subtotal:----	12,978	10,842	22,523	22,103	120,279	14,942	9,111	24,057	24,744	120,656	
Fresh Tang/Mand MT											
European Union	0	0	0	0	2,024	0	0	0	0	1,382	
Canada	3,303	3,003	4,628	3,828	13,361	2,945	2,272	4,248	2,998	11,025	
Korea, Republic o	432	333	435	333	3,535	382	300	386	300	3,089	
Japan	0	17	0	52	2,726	0	15	0	35	2,401	
Australia	207	173	207	173	692	122	97	122	97	581	
Other Countries	71	191	73	204	695	60	146	62	160	733	
Subtotal:----	4,014	3,718	5,343	4,590	23,033	3,509	2,830	4,819	3,591	19,209	
Canned Pears MT											
European Union	49	2	116	78	438	40	3	95	65	364	
Canada	279	388	633	671	2,446	305	398	694	701	2,704	
Mexico	0	0	0	0	91	0	0	0	0	27	
Korea, Republic o	0	0	0	0	43	0	0	0	0	37	
Japan	38	35	45	35	163	51	42	63	42	181	
Other Countries	40	52	57	156	314	31	70	46	170	317	
Subtotal:----	405	478	851	940	3,494	426	513	897	978	3,630	
Canned Pineapple MT											
European Union	15	44	15	109	1,124	18	48	18	109	1,030	
Canada	33	66	76	314	882	37	63	74	313	838	
Philippines	0	0	0	83	218	0	0	0	69	181	
Korea, Republic o	224	0	235	0	369	189	0	201	0	331	
Japan	3	47	51	47	526	9	55	65	55	516	
Other Countries	115	82	175	128	575	116	78	166	120	547	
Subtotal:----	390	239	552	681	3,694	368	245	525	665	3,443	
Dried Prunes MT											
European Union	2,377	2,924	6,556	6,679	30,764	5,345	5,760	14,187	13,123	64,621	
Canada	346	461	706	777	4,137	720	973	1,581	1,628	8,860	
Netherlands Antil	3	331	26	487	2,199	9	817	68	1,217	5,552	
Singapore	280	190	632	565	3,182	446	435	960	1,225	5,657	
Japan	1,204	2,242	1,874	3,469	15,639	2,778	4,365	4,355	6,735	31,667	
Other Countries	1,445	1,134	3,139	2,366	11,614	2,617	2,062	6,166	4,418	22,042	
Subtotal:----	5,654	7,283	12,933	14,343	67,535	11,915	14,412	27,317	28,347	138,398	

U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	
<b>Dried Raisins MT</b>											
European Union	3,558	4,227	10,702	9,106	47,432	5,843	7,874	17,986	16,498	83,689	
Canada	1,036	892	2,018	2,038	11,436	2,090	1,760	3,985	4,017	22,589	
Hong Kong	492	371	1,184	976	4,371	1,036	691	2,524	1,876	8,769	
Taiwan	357	599	661	966	4,334	498	878	918	1,476	6,454	
Japan	2,292	1,765	6,268	3,873	25,836	4,387	2,942	10,764	6,685	43,712	
Other Countries	2,161	4,515	5,075	7,050	21,606	3,809	7,590	8,994	11,865	38,741	
Subtotal:----	9,896	12,367	25,908	24,009	115,016	17,662	21,735	45,171	42,417	203,954	
<b>Dried Figs MT</b>											
Canada	51	48	120	123	945	215	181	484	497	2,776	
Mexico	0	17	0	17	41	0	44	0	44	119	
China, Peoples Re	0	0	0	0	33	0	0	0	0	95	
Hong Kong	68	78	208	115	567	225	429	840	629	2,071	
Japan	23	33	50	74	363	109	105	196	190	1,193	
Other Countries	7	27	20	50	80	32	98	71	135	229	
Subtotal:----	149	202	398	378	2,027	580	856	1,591	1,495	6,483	
<b>Fruit Mixtures MT</b>											
Canada	766	744	1,467	1,449	7,713	820	901	1,679	1,691	8,453	
Singapore	206	99	620	194	1,789	250	144	737	244	2,173	
Philippines	251	3	1,059	163	1,419	287	4	1,229	147	1,729	
Hong Kong	118	12	341	35	1,183	148	26	421	62	1,437	
Japan	268	381	462	646	3,278	304	496	558	848	3,728	
Other Countries	603	824	1,364	2,074	7,094	794	1,099	1,737	3,276	9,534	
Subtotal:----	2,212	2,063	5,314	4,561	22,475	2,604	2,671	6,362	6,268	27,055	
<b>Dates MT</b>											
European Union	31	184	330	464	939	169	470	1,485	1,615	3,304	
Canada	112	164	243	313	811	349	386	784	797	2,337	
Switzerland	75	87	220	159	353	371	503	1,065	860	1,618	
Indonesia	136	26	167	26	234	361	82	508	82	693	
Australia	82	87	153	128	508	411	424	797	652	2,265	
Other Countries	234	372	415	436	983	531	725	898	898	1,915	
Subtotal:----	669	920	1,529	1,527	3,829	2,191	2,590	5,537	4,903	12,132	
<b>Fcoj KL</b>											
European Union	8,057	8,612	15,214	14,549	205,417	4,152	4,050	7,823	6,493	80,212	
Canada	2,037	1,695	4,135	3,412	22,939	3,494	2,273	7,262	4,621	36,575	
Switzerland	0	0	0	77	54,032	0	0	0	36	10,500	
Korea, Republic o	2,336	546	3,886	1,363	20,003	954	218	2,310	865	11,363	
Japan	4,291	2,532	6,031	4,299	50,381	1,600	814	3,153	1,736	25,360	
Other Countries	2,991	1,697	6,183	4,540	29,153	1,423	804	3,015	1,989	13,624	
Subtotal:----	19,712	15,083	35,449	28,240	381,926	11,622	8,159	23,563	15,741	177,635	
<b>Orange Juice MtCnc KL</b>											
European Union	2,628	4,187	5,811	5,627	29,297	1,665	2,543	3,753	3,820	18,968	
Canada	10,899	10,762	20,213	22,098	127,249	7,323	7,308	13,525	15,018	87,612	
Korea, Republic o	98	336	239	377	4,212	177	252	282	283	3,365	
Hong Kong	397	19	496	103	3,209	777	14	843	74	2,821	
Japan	90	1,135	160	1,475	2,524	76	791	143	1,065	1,913	
Other Countries	955	722	2,170	1,633	12,431	741	574	1,746	1,328	10,194	
Subtotal:----	15,067	17,161	29,089	31,313	178,921	10,760	11,482	20,292	21,588	124,874	
<b>Grapefruit Juice Cnc KL</b>											
European Union	1,474	3,995	4,125	6,913	37,464	861	1,865	2,180	3,272	20,113	
Canada	336	312	601	565	3,399	489	415	899	719	4,611	
Mexico	120	44	253	44	497	86	32	178	32	389	
Israel	99	0	602	0	602	27	0	170	0	170	
Japan	1,132	931	2,028	1,215	17,137	717	526	1,463	675	13,908	
Other Countries	152	213	536	430	3,378	115	120	339	236	2,301	
Subtotal:----	3,313	5,495	8,145	9,167	62,477	2,295	2,958	5,230	4,934	41,493	
<b>Fresh Asparagus MT</b>											
European Union	25	51	26	51	737	54	112	58	112	1,980	
Canada	129	191	228	295	6,289	379	598	646	953	16,883	
Mexico	0	0	0	5	53	0	0	0	12	125	
Switzerland	0	0	0	0	1,423	0	0	0	0	4,468	
Japan	0	0	0	51	6,431	0	0	0	64	26,529	
Other Countries	1	0	7	5	226	3	0	9	25	703	
Subtotal:----	155	242	261	408	15,160	436	709	713	1,166	50,688	
<b>Fresh Broccoli MT</b>											
Canada	6,701	8,548	9,978	11,058	73,326	4,244	4,491	6,086	6,631	45,436	
Mexico	15	28	69	137	634	38	42	100	156	558	
Hong Kong	124	417	500	660	6,603	124	356	387	584	5,778	
Taiwan	0	53	105	172	2,865	0	77	90	223	2,782	
Japan	2,575	3,784	6,211	7,309	46,184	1,982	3,177	4,648	6,361	37,009	
Other Countries	19	55	38	443	779	10	54	23	310	652	
Subtotal:----	9,434	12,885	16,901	19,781	130,391	6,397	8,198	11,335	14,266	92,215	

U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996		Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996
<b>Fresh Carrots MT</b>											
Canada	2,475	3,644	4,459	6,208	87,276		1,664	2,319	3,006	4,082	42,416
Mexico	104	55	295	345	1,022		49	38	139	153	458
Trinidad and Toba	0	20	0	20	1,014		0	13	0	13	455
United Arab Emira	307	276	825	798	3,368		77	91	232	277	1,227
Japan	31	87	178	119	1,342		51	91	210	121	1,363
Other Countries	356	614	859	1,102	6,000		184	304	429	543	3,168
Subtotal:----	3,273	4,695	6,615	8,592	100,022		2,026	2,855	4,017	5,189	49,087
<b>Fresh Lettuce MT</b>											
Canada	23,496	24,916	45,743	45,489	242,280		12,856	14,858	23,278	28,738	117,746
Mexico	1,829	1,589	3,807	3,838	19,251		757	614	1,517	1,538	7,571
Singapore	141	161	468	399	3,522		106	193	296	387	2,366
Hong Kong	640	1,065	2,014	1,848	18,490		366	708	1,141	1,257	10,905
Taiwan	43	35	239	251	3,496		19	20	130	160	2,101
Other Countries	363	945	728	1,563	7,442		397	563	775	1,054	5,922
Subtotal:----	26,512	28,712	52,999	53,388	294,482		14,503	16,956	27,137	33,134	146,612
<b>Canned Sweet Corn MT</b>											
European Union	4,021	1,870	6,919	6,087	40,865		2,709	1,338	4,578	4,269	29,046
Korea, Republic o	1,628	2,800	2,284	4,139	18,282		1,724	2,733	2,379	4,173	18,331
Hong Kong	3,101	522	4,660	767	22,410		2,660	413	3,962	622	18,279
Taiwan	1,500	1,303	2,891	3,497	23,509		1,481	1,172	2,628	3,058	20,998
Japan	6,050	4,008	11,585	7,979	64,852		5,086	3,333	9,650	6,674	53,779
Other Countries	3,062	3,200	6,174	5,827	33,551		2,778	2,403	5,243	4,497	26,919
Subtotal:----	19,361	13,704	34,513	28,296	203,469		16,438	11,393	28,439	23,293	167,353
<b>Fresh Onions MT</b>											
Canada	8,516	9,157	15,618	15,594	118,736		3,034	3,173	5,501	5,469	42,172
Mexico	1,484	1,556	7,709	3,861	15,570		594	576	2,994	1,457	6,444
Korea, Republic o	58	0	11,917	14	14,022		14	0	5,693	4	8,698
Taiwan	1,918	2,720	4,555	5,527	15,217		532	809	1,243	1,593	4,497
Japan	10,454	15,905	24,335	37,296	69,440		2,567	3,846	5,959	8,191	17,261
Other Countries	3,901	5,826	7,671	9,205	32,136		1,486	2,172	2,783	3,405	13,392
Subtotal:----	26,331	35,164	71,805	71,497	265,121		8,228	10,577	24,174	20,119	92,464
<b>Fresh Tomatoes MT</b>											
European Union	0	19	0	19	3,743		0	44	0	44	7,781
Canada	12,772	10,385	23,864	22,605	132,734		10,557	11,281	19,005	19,723	103,461
Mexico	163	345	823	2,570	15,867		194	461	719	2,504	11,491
Hong Kong	0	0	0	0	356		0	0	0	0	175
Japan	0	65	0	128	174		0	58	0	105	106
Other Countries	17	79	69	185	776		18	70	83	168	770
Subtotal:----	12,952	10,893	24,756	25,507	153,650		10,769	11,913	19,807	22,544	123,783
<b>Canned Tomato Paste MT</b>											
European Union	373	6,617	450	7,595	15,390		296	2,821	347	3,319	6,222
Canada	3,688	3,403	11,078	7,158	47,236		2,713	2,469	8,568	5,370	34,943
Brazil	2,246	0	3,505	0	27,396		1,415	0	2,322	0	17,915
Korea, Republic o	537	738	656	1,760	8,310		456	606	554	1,549	6,910
Japan	1,103	1,682	1,502	3,839	9,533		818	1,156	1,228	2,848	7,720
Other Countries	1,584	3,246	4,178	4,337	21,089		1,188	2,220	3,151	3,070	15,608
Subtotal:----	9,530	15,686	21,368	24,690	128,954		6,886	9,273	16,170	16,156	89,320
<b>Canned Tomato Sauce MT</b>											
European Union	278	893	830	1,513	4,999		436	992	1,059	1,799	6,459
Canada	4,794	5,112	11,197	10,500	59,272		4,436	4,376	10,111	9,428	54,848
Mexico	314	592	713	1,148	5,927		227	491	565	915	4,618
Korea, Republic o	62	469	141	624	1,688		77	357	131	504	1,569
Japan	582	448	1,106	1,075	5,749		606	474	1,264	1,083	6,442
Other Countries	717	1,982	1,495	3,192	10,474		813	1,831	1,627	3,033	11,011
Subtotal:----	6,747	9,495	15,483	18,052	88,108		6,596	8,521	14,757	16,762	84,947
<b>Frozen French Fries MT</b>											
Philippines	1,484	1,958	2,951	3,445	18,645		1,045	1,363	2,116	2,388	13,390
Korea, Republic o	2,528	1,889	4,838	4,667	28,494		1,784	1,223	3,466	3,034	21,023
Hong Kong	2,396	1,871	4,695	4,391	27,293		1,614	1,249	3,108	2,957	18,247
Taiwan	1,253	1,631	2,730	3,452	21,128		826	1,080	1,807	2,257	14,121
Japan	18,165	22,612	34,293	39,736	200,342		13,489	15,195	25,466	26,740	147,601
Other Countries	7,724	9,488	15,685	18,129	100,773		6,036	7,645	12,319	14,724	79,954
Subtotal:----	33,550	39,449	65,192	73,821	396,674		24,793	27,755	48,283	52,101	294,335
<b>Almonds Unshelled MT</b>											
European Union	830	1,113	2,116	2,758	6,043		2,005	2,423	4,946	6,078	14,259
India	1,421	615	2,422	2,219	13,609		3,539	1,860	5,970	7,010	36,783
Hong Kong	204	161	312	283	666		495	406	795	706	1,665
Taiwan	31	0	159	184	541		74	0	386	644	1,347
Japan	92	417	398	918	1,136		285	1,005	1,038	2,294	2,820
Other Countries	422	601	1,135	1,631	2,740		1,014	1,283	2,652	3,737	6,785
Subtotal:----	3,000	2,907	6,542	7,993	24,735		7,411	6,976	15,787	20,469	63,658



U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996		Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996
<b>Frozen Sweet Corn MT</b>											
European Union	283	504	385	697	2,816		223	354	297	504	1,926
Canada	85	170	218	293	4,690		72	124	194	223	3,542
Mexico	24	308	132	622	2,114		13	186	71	377	983
Hong Kong	613	559	1,173	1,191	5,142		394	394	811	823	3,703
Japan	4,244	6,518	7,399	11,047	40,865		3,742	5,201	6,741	9,130	38,092
Other Countries	517	2,245	1,603	3,068	9,574		498	1,736	1,451	2,447	7,965
Subtotal:-----	5,767	10,304	10,910	16,918	65,202		4,941	7,995	9,565	13,505	56,212
<b>Almonds Shelled/Prep MT</b>											
European Union	8,833	8,551	29,317	24,148	105,022		44,342	33,566	142,074	91,872	519,178
Canada	1,005	1,240	2,133	2,550	8,421		4,826	4,707	10,437	9,876	40,499
Mexico	231	823	789	1,356	3,944		647	1,671	1,822	2,773	10,276
Switzerland	260	337	706	809	3,317		1,594	1,181	4,030	3,230	18,549
Japan	1,911	2,522	3,643	4,789	16,483		11,035	11,166	20,986	21,558	95,101
Other Countries	2,917	3,871	7,500	9,874	26,389		15,584	16,102	38,001	41,503	132,484
Subtotal:-----	15,157	17,344	44,088	43,526	163,576		78,028	68,393	217,350	170,812	816,088
<b>Walnuts, Shelled MT</b>											
European Union	872	1,493	1,985	3,067	4,444		1,436	2,712	4,372	5,942	11,119
Canada	292	282	699	517	3,131		1,033	1,028	2,346	1,984	8,869
Brazil	730	273	902	273	1,319		1,197	327	1,606	327	2,036
Israel	158	298	392	894	1,309		815	1,554	1,999	3,866	6,136
Japan	1,190	753	1,672	1,195	10,218		5,410	3,711	7,538	6,201	32,570
Other Countries	374	784	697	1,661	3,515		1,489	2,472	2,841	5,168	12,746
Subtotal:-----	3,615	3,883	6,348	7,606	23,936		11,381	11,804	20,703	23,488	73,476
<b>Walnuts, Unshelled MT</b>											
European Union	7,953	6,246	40,502	25,169	48,664		16,589	11,660	87,187	49,116	104,206
Canada	545	655	869	1,039	1,476		1,301	1,261	2,051	2,096	3,478
Brazil	512	821	1,698	868	1,698		1,099	1,732	3,750	1,832	3,750
Israel	403	0	700	226	1,344		737	0	1,312	428	2,464
Japan	237	34	341	97	938		442	63	629	199	1,591
Other Countries	498	1,013	2,279	2,314	3,068		895	1,953	4,632	4,538	6,269
Subtotal:-----	10,149	8,769	46,390	29,714	57,187		21,061	16,669	99,560	58,209	121,757
<b>Hop Pellets MT</b>											
European Union	115	154	281	323	1,080		698	660	1,966	1,245	6,810
Canada	180	148	307	311	1,631		1,022	871	1,964	1,882	10,643
Colombia	0	0	19	0	323		0	0	295	0	2,956
Brazil	484	69	488	74	1,830		1,696	118	1,724	169	7,765
Japan	20	35	20	35	239		66	132	66	132	870
Other Countries	5	30	21	145	1,017		23	113	94	594	4,691
Subtotal:-----	804	435	1,136	888	6,120		3,505	1,894	6,109	4,022	33,737
<b>Hop Extract MT</b>											
European Union	201	127	281	241	1,229		2,778	1,681	4,247	3,110	18,313
Mexico	89	135	103	144	643		1,790	3,632	2,036	3,742	12,219
Brazil	58	40	78	142	529		606	928	951	2,183	9,274
Argentina	9	0	9	17	168		90	0	90	375	1,612
Hong Kong	15	0	18	0	127		132	0	144	0	1,373
Other Countries	64	44	122	130	772		687	766	2,116	2,443	14,289
Subtotal:-----	436	347	612	674	3,468		6,083	7,007	9,584	11,855	57,080
<b>Hops, Nspf MT</b>											
European Union	106	59	438	443	1,202		533	515	2,124	2,016	5,413
Mexico	0	0	0	0	73		0	0	0	0	423
Brazil	7	14	7	14	113		68	510	68	510	454
Philippines	12	0	25	0	41		226	0	451	0	713
Japan	0	0	-	0	276		0	0	6	0	1,164
Other Countries	2	6	10	27	183		14	72	70	154	1,477
Subtotal:-----	127	78	480	485	1,888		842	1,097	2,719	2,680	9,644
<b>Grape Wine KL</b>											
European Union	4,392	7,588	11,848	15,850	89,715		8,536	14,003	22,737	30,601	184,575
Canada	2,744	3,199	6,072	6,520	34,618		7,374	7,228	15,559	14,113	72,909
Switzerland	673	644	1,356	2,211	8,760		1,228	1,233	2,265	4,081	15,339
Hong Kong	418	724	610	1,302	6,896		721	1,185	1,092	2,143	10,908
Japan	1,487	2,300	3,442	5,413	20,691		2,412	3,985	5,425	8,602	31,573
Other Countries	2,708	3,411	6,039	6,700	33,719		4,356	5,506	9,682	10,793	52,856
Subtotal:-----	12,423	17,867	29,368	37,996	194,399		24,627	33,141	56,760	70,333	368,160

U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	
<b>Fresh Apples MT</b>											
Canada	13,130	9,827	34,620	24,619	72,932	4,654	3,370	10,363	7,316	27,000	
Chile	0	0	0	0	26,611	0	0	0	0	14,386	
New Zealand	0	0	0	0	52,508	0	0	0	0	33,322	
Other Countries	0	2	0	8	16,514	0	1	0	7	8,028	
Subtotal:----	13,130	9,829	34,620	24,628	168,564	4,654	3,371	10,363	7,323	82,736	
<b>Fresh Pears MT</b>											
Chile	0	0	0	0	37,216	0	0	0	0	18,537	
Argentina	0	0	0	0	31,230	0	0	0	0	21,123	
New Zealand	54	0	54	0	3,907	216	0	216	0	3,315	
Other Countries	693	795	925	1,261	6,168	1,722	2,058	2,363	3,187	7,330	
Subtotal:----	747	795	979	1,261	78,521	1,937	2,058	2,579	3,187	50,306	
<b>Fresh Apricots MT</b>											
Chile	62	11	62	11	1,011	114	23	114	23	1,146	
Turkey	0	1	0	1	18	0	4	0	4	44	
New Zealand	0	0	0	0	245	0	0	0	0	656	
Other Countries	14	0	15	0	39	93	0	95	0	118	
Subtotal:----	76	12	77	12	1,313	207	27	209	27	1,964	
<b>Fresh Peach/Nect MT</b>											
Canada	0	0	14	0	333	0	0	12	0	316	
Mexico	0	0	0	0	62	0	0	0	0	60	
Chile	625	670	630	670	41,216	724	778	737	778	32,464	
Other Countries	0	5	1	5	60	0	4	2	4	61	
Subtotal:----	625	675	645	675	41,672	724	782	751	782	32,901	
<b>Fr. Plums/Prunes MT</b>											
Leeward-Windward	10	23	39	56	92	10	20	38	47	98	
Chile	30	42	30	42	22,684	66	84	66	84	20,724	
South Africa, Rep	0	0	0	0	53	0	0	0	0	55	
Other Countries	17	0	17	0	94	20	0	23	2	145	
Subtotal:----	57	65	86	97	22,923	96	105	126	133	21,023	
<b>Fresh Grapes MT</b>											
Mexico	0	0	0	0	75,713	0	0	0	0	95,442	
Chile	68	28	68	28	264,609	112	28	112	28	280,190	
South Africa, Rep	0	0	0	0	7,437	0	0	0	0	8,676	
Other Countries	204	415	2,402	3,379	3,808	176	581	765	2,206	1,875	
Subtotal:----	272	442	2,470	3,407	351,567	288	609	877	2,234	386,183	
<b>Raspberries MT</b>											
Canada	0	0	1	0	4,206	0	0	5	0	5,860	
Mexico	25	73	31	113	266	169	324	188	500	2,327	
Chile	27	8	27	8	1,387	58	16	58	16	3,017	
Other Countries	66	15	84	43	199	141	58	173	120	451	
Subtotal:----	119	96	143	164	6,059	368	397	423	636	11,655	
<b>Fresh Strawberries MT</b>											
Canada	0	0	0	0	88	0	0	0	0	186	
Mexico	466	145	466	145	14,459	597	211	597	211	24,496	
New Zealand	284	206	286	220	544	1,044	673	1,046	729	1,926	
Other Countries	51	15	71	16	111	102	41	123	43	237	
Subtotal:----	801	366	823	380	15,203	1,743	926	1,766	984	26,844	
<b>Bananas MT</b>											
Honduras	38,249	46,124	89,588	106,253	547,556	9,368	11,534	22,753	26,031	143,174	
Costa Rica	96,364	82,346	171,758	146,966	983,120	30,241	24,391	54,762	43,032	312,764	
Ecuador	58,089	69,448	121,975	139,769	863,439	16,315	20,545	34,289	41,579	265,046	
Other Countries	109,114	115,449	230,274	239,487	1,333,792	30,749	30,376	66,017	63,331	401,763	
Subtotal:----	301,815	313,367	613,595	632,474	3,727,906	86,674	86,846	177,822	173,972	1,122,747	
<b>Mangoes MT</b>											
Mexico	0	0	0	0	157,870	0	0	0	0	97,063	
Guatemala	0	0	0	3	6,766	0	0	0	3	2,851	
Haiti	120	4	196	4	10,607	76	3	119	3	7,186	
Other Countries	3,867	2,106	6,375	4,152	15,872	3,496	2,169	6,771	4,244	15,909	
Subtotal:----	3,987	2,110	6,571	4,158	191,115	3,573	2,172	6,890	4,250	123,009	
<b>Pineapple MT</b>											
Mexico	450	1,230	700	2,410	13,055	143	370	227	728	3,721	
Honduras	1,809	2,096	2,978	4,086	22,504	507	581	840	1,179	6,459	
Costa Rica	8,108	14,184	16,779	37,391	124,262	3,646	6,564	7,673	15,448	56,057	
Other Countries	1,075	541	2,629	1,353	11,433	901	394	1,856	969	8,204	
Subtotal:----	11,443	18,051	23,085	45,241	171,253	5,197	7,909	10,596	18,324	74,441	
<b>Cantaloupe MT</b>											
Mexico	11,314	16,550	16,962	24,586	146,007	4,590	5,293	5,514	7,112	57,502	
Guatemala	3,093	3,746	3,093	3,746	66,739	1,043	1,325	1,043	1,325	21,621	
Honduras	101	559	101	559	92,458	22	78	22	78	16,626	
Other Countries	1,044	383	1,044	384	90,899	332	56	332	57	34,627	
Subtotal:----	15,553	21,238	21,201	29,274	396,103	5,987	6,751	6,911	8,572	130,376	

U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	
Other Melons	MT										
Mexico	18,061	23,619	29,903	35,666	275,579	5,846	6,041	9,775	9,478	62,073	
Honduras	0	81	0	81	32,643	0	10	0	10	5,829	
Costa Rica	0	0	0	0	27,345	0	0	0	0	10,627	
Other Countries	1,220	532	1,279	607	47,336	349	163	402	196	17,597	
Subtotal:----	19,281	24,231	31,182	36,354	382,903	6,195	6,214	10,177	9,685	96,126	
Fr. Orng Inc Tmpl	MT										
Mexico	101	155	132	155	10,288	47	60	56	60	4,415	
Dominican Republi	49	0	369	118	3,155	21	0	161	62	1,249	
Australia	0	0	27	286	15,127	0	0	35	601	20,583	
Other Countries	39	673	79	902	1,083	8	609	15	884	510	
Subtotal:----	189	828	606	1,451	29,653	75	669	268	1,607	26,756	
Canned Mandarins	MT										
European Union	1,434	376	2,773	1,413	23,398	1,465	321	2,691	1,320	23,464	
Mexico	138	194	258	332	1,686	139	202	259	343	1,789	
China, Peoples Re	1,670	2,654	3,635	5,766	30,572	1,701	2,378	3,812	5,179	28,581	
Other Countries	38	55	119	97	634	60	72	153	121	949	
Subtotal:----	3,280	3,279	6,785	7,609	56,289	3,365	2,973	6,915	6,963	54,784	
Canned Black Olive	MIXED										
Mexico	13,000	152,950	188,000	987,021	6,112,150	6	97	93	634	3,156	
Israel	0	0	0	0	193,880	0	0	0	0	367	
Morocco	0	20,792	9,361	39,842	211,232	0	20	22	42	279	
Other Countries	18,832	50,834	22,560	78,613	235,227	35	104	43	187	588	
Subtotal:----	31,832	224,576	219,921	1,105,476	6,752,489	42	222	158	863	4,390	
Canned Green Olive	MIXED										
European Union	5,262,318	5,979,874	10,965,105	11,805,685	60,353,438	14,204	13,745	30,344	27,827	153,846	
Turkey	11,900	144,807	56,170	263,437	1,937,911	21	226	80	394	2,810	
Morocco	529,574	940,698	948,529	1,535,359	11,438,714	1,031	1,616	1,898	2,576	21,052	
Other Countries	100,080	92,576	168,576	203,799	1,033,607	265	187	446	393	2,153	
Subtotal:----	5,903,872	7,157,955	12,138,380	13,808,280	74,763,670	15,521	15,774	32,767	31,189	179,860	
Canned Peaches	MT										
European Union	3,029	1,700	7,219	3,495	24,296	1,969	1,116	4,704	2,361	16,031	
Chile	80	1	117	3	1,254	50	2	76	4	895	
South Africa, Rep	406	238	636	460	3,457	248	181	405	364	2,413	
Other Countries	7	2	76	48	476	5	4	54	32	370	
Subtotal:----	3,521	1,940	8,049	4,006	29,483	2,272	1,303	5,238	2,762	19,709	
Canned Pineapple	MT										
Thailand	2,433	1,874	5,120	7,010	76,059	1,648	1,320	3,466	4,849	51,135	
Indonesia	4,644	5,549	10,564	13,296	63,076	3,629	4,312	8,225	10,378	49,351	
Philippines	8,224	12,108	21,650	21,455	124,332	5,438	8,468	14,455	14,950	82,478	
Other Countries	1,657	2,885	4,176	5,356	30,946	1,260	2,167	3,267	4,049	23,654	
Subtotal:----	16,958	22,417	41,509	47,117	294,413	11,974	16,268	29,413	34,226	206,618	
Dried Apricots	MT										
Turkey	1,421	1,481	2,578	3,114	10,599	3,905	3,909	6,797	7,997	29,450	
China, Peoples Re	0	0	0	0	293	0	2	0	2	605	
Australia	16	1	16	16	137	34	9	34	94	516	
Other Countries	3	1	43	70	209	9	4	87	180	487	
Subtotal:----	1,440	1,484	2,637	3,201	11,237	3,948	3,924	6,919	8,273	31,058	
Dates	MT										
Mexico	18	16	64	73	148	20	33	103	111	231	
Pakistan	191	200	222	276	1,937	177	178	196	249	1,778	
China, Peoples Re	28	33	43	36	341	50	94	71	102	620	
Other Countries	27	35	65	45	162	53	147	199	167	479	
Subtotal:----	264	284	394	430	2,587	301	453	568	629	3,107	
Dried Figs	MT										
European Union	279	69	873	544	924	637	199	2,021	1,349	2,151	
Mexico	40	25	173	79	395	124	25	460	99	959	
Turkey	122	174	304	365	381	273	367	685	771	872	
Other Countries	0	0	0	3	36	0	0	0	10	77	
Subtotal:----	440	267	1,349	991	1,736	1,034	591	3,166	2,230	4,059	
Dried Raisins	MT										
Mexico	680	826	1,696	1,426	5,045	647	708	1,632	1,253	4,860	
Chile	183	18	326	155	3,482	221	27	391	228	4,824	
South Africa, Rep	88	225	88	398	1,165	98	316	98	564	1,505	
Other Countries	30	287	109	520	1,715	35	244	122	523	2,002	
Subtotal:----	982	1,356	2,219	2,500	11,407	1,001	1,295	2,243	2,567	13,190	
Apple Juice	KL										
European Union	42,604	9,994	74,506	13,981	327,597	14,169	3,173	25,516	4,829	120,190	
Argentina	6,515	31,709	12,061	80,377	259,968	1,513	8,540	3,494	19,378	65,864	
Hungary	28,188	1,496	31,303	1,504	140,388	8,073	464	9,166	465	44,610	
Other Countries	21,703	34,464	43,265	62,256	357,033	7,763	8,769	16,676	16,829	123,967	
Subtotal:----	99,011	77,663	161,134	158,118	1,084,986	31,518	20,947	54,851	41,501	354,632	

U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region		Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996
Fcoj	KL										
Mexico		14,442	9,337	22,667	15,142	188,382	3,807	1,880	6,105	3,035	43,267
Costa Rica		0	2,202	552	6,617	72,772	0	355	194	1,319	16,720
Brazil		124,718	34,109	243,302	101,916	731,512	27,866	5,196	56,402	16,558	148,961
Other Countries		5,224	1,147	6,632	3,873	107,210	1,104	237	1,380	871	24,130
Subtotal:----		144,383	46,795	273,152	127,549	1,099,876	32,778	7,669	64,080	21,784	233,077
Grape Juice	KL										
Mexico		3,063	741	5,779	1,600	21,889	1,172	567	2,294	1,078	9,889
Brazil		2,189	1,626	5,791	3,985	21,816	855	692	2,129	1,720	9,341
Argentina		8,703	9,303	20,308	21,725	163,836	2,696	3,070	6,002	7,549	54,839
Other Countries		963	670	3,031	1,397	35,748	592	437	1,548	1,039	20,982
Subtotal:----		14,918	12,340	34,909	28,707	243,290	5,315	4,765	11,973	11,385	95,051
Pineapple Juice, Con	KL										
Thailand		3,490	2,429	6,828	5,627	84,785	1,167	771	2,483	1,759	27,316
Indonesia		2,431	2,268	4,723	5,953	31,965	757	679	1,466	1,778	9,782
Philippines		6,831	6,691	20,767	15,481	104,714	1,550	1,628	4,256	3,959	21,680
Other Countries		2,119	1,231	4,860	2,798	25,565	800	347	1,682	786	8,994
Subtotal:----		14,872	12,618	37,177	29,858	247,028	4,274	3,425	9,886	8,281	67,773
Frozen Strawberries	MT										
Canada		43	26	44	75	184	51	63	108	144	372
Mexico		121	226	351	446	22,049	93	184	275	358	19,156
China, Peoples Re		0	0	0	0	22	0	0	0	0	45
Other Countries		0	3	0	5	24	36	23	91	56	634
Subtotal:----		164	255	395	527	22,279	180	270	474	559	20,207
Fresh Beans	MT										
Canada		2	0	63	13	1,631	3	0	42	7	950
Mexico		668	758	746	810	18,182	705	811	777	834	22,316
Guatemala		44	11	72	27	140	36	7	61	17	120
Other Countries		2	14	20	28	198	4	16	30	31	263
Subtotal:----		716	783	901	878	20,150	747	834	909	889	23,648
Fresh Carrots	MT										
Canada		10,950	12,795	21,435	23,694	63,557	2,666	2,849	4,917	5,135	16,112
Mexico		2,349	2,189	4,125	3,199	35,613	374	536	716	829	6,073
Israel		0	0	0	0	96	0	0	0	0	73
Other Countries		14	44	43	64	204	4	19	15	33	95
Subtotal:----		13,313	15,028	25,603	26,958	99,470	3,044	3,404	5,648	5,997	22,353
Fresh Cabbage	MT										
Canada		1,968	6,343	3,886	9,007	21,419	420	1,678	804	2,235	4,514
Mexico		609	2,297	1,080	3,872	7,855	92	360	168	581	1,372
Costa Rica		0	0	0	0	23	0	0	0	0	13
Other Countries		0	0	1	0	26	2	0	4	0	34
Subtotal:----		2,577	8,640	4,967	12,879	29,323	514	2,038	977	2,815	5,932
Fresh Celery	MT										
Canada		72	64	849	1,115	4,300	21	25	224	352	1,508
Mexico		238	1,335	238	1,600	23,321	46	285	46	338	6,047
Dominican Republi		8	4	18	6	121	6	4	12	6	77
Other Countries		6	5	13	11	78	21	12	46	26	163
Subtotal:----		324	1,407	1,118	2,732	27,820	93	326	328	722	7,796
Fresh Cucumbers	MT										
Canada		119	98	400	739	9,960	182	129	562	825	9,533
Mexico		36,754	39,400	46,142	50,021	285,254	11,029	12,247	14,574	15,626	88,569
Honduras		3	0	3	0	4,805	1	0	1	0	916
Other Countries		180	161	400	187	2,286	236	140	505	165	1,805
Subtotal:----		37,056	39,660	46,946	50,947	302,306	11,448	12,516	15,642	16,616	100,823
Fresh Cauliflower	MT										
Canada		61	145	231	3,000	9,222	21	61	107	1,476	4,144
Mexico		0	1,308	0	2,326	1,559	0	375	0	686	503
Guatemala		0	0	0	0	28	0	0	0	0	30
Other Countries		0	0	2	0	40	0	0	3	0	29
Subtotal:----		61	1,453	233	5,327	10,849	21	436	110	2,162	4,707
Fresh Garlic	MT										
European Union		90	151	280	244	1,080	186	287	540	452	1,896
Mexico		48	13	169	58	12,537	71	44	344	168	13,057
Argentina		0	0	0	0	2,115	0	0	0	0	3,177
Other Countries		79	131	395	144	1,838	95	153	387	182	2,531
Subtotal:----		217	295	844	446	17,570	352	485	1,271	802	20,661
Onions, Exc Seed	MT										
Canada		3,086	4,002	6,925	7,125	22,717	818	914	1,965	1,828	6,644
Mexico		10,278	11,067	15,635	16,766	213,277	11,780	11,524	18,796	18,193	108,813
Peru		485	1,216	485	1,534	10,553	130	612	130	715	3,582
Other Countries		712	605	1,317	1,263	13,438	438	445	836	861	7,484
Subtotal:----		14,561	16,889	24,362	26,688	259,984	13,166	13,495	21,727	21,598	126,523



## U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country	Region	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996
Fresh Peppers MT											
European Union		2,488	2,480	4,374	4,328	18,787	5,551	6,498	8,824	10,006	42,222
Canada		216	403	1,253	1,731	10,131	705	1,277	1,778	2,932	16,762
Mexico		13,191	15,270	25,048	29,726	251,474	8,296	13,163	13,091	18,956	186,686
Other Countries		190	337	262	426	3,829	334	491	452	596	6,238
Subtotal:----		16,085	18,491	30,937	36,211	284,221	14,886	21,430	24,145	32,490	251,908
Seed Potatoes MT											
Canada		3,438	4,966	5,847	5,361	114,218	678	1,123	1,493	1,220	20,189
Brazil		0	0	0	0	3	0	0	0	0	3
China, Peoples Re		0	0	0	0	11	0	0	0	0	8
Other Countries		0	0	0	0	0	0	0	0	0	5
Subtotal:----		3,438	4,966	5,847	5,361	114,233	678	1,123	1,493	1,220	20,204
Table Potatoes MT											
European Union		0	18	0	18	62	0	12	0	12	56
Canada		20,905	30,608	43,690	55,745	210,604	3,723	6,022	8,282	11,401	38,993
Japan		0	4	0	4	13	0	8	0	8	38
Other Countries		0	0	0	0	12	0	0	0	0	9
Subtotal:----		20,905	30,629	43,690	55,767	210,692	3,723	6,042	8,282	11,422	39,097
Fresh Tomatoes MT											
European Union		2,722	3,592	5,223	6,321	38,267	5,148	6,281	9,236	10,757	61,384
Canada		671	1,692	2,130	4,653	34,920	1,263	3,073	3,872	7,543	55,045
Mexico		34,646	33,489	67,796	56,314	666,748	19,934	25,678	38,525	40,252	488,503
Other Countries		57	88	85	88	3,270	63	101	104	101	6,681
Subtotal:----		38,096	38,861	75,233	67,376	743,205	26,407	35,134	51,737	58,653	611,612
Fresh Asparagus MT											
Mexico		638	822	727	1,125	20,970	1,588	2,470	1,784	3,443	37,985
Peru		2,025	2,392	3,685	4,395	12,002	3,328	4,258	6,150	7,887	20,530
Chile		657	898	2,194	2,469	2,581	582	898	1,915	2,395	2,305
Other Countries		529	710	1,156	1,278	3,193	923	1,300	1,818	2,201	5,769
Subtotal:----		3,849	4,822	7,762	9,265	38,745	6,420	8,925	11,667	15,926	66,588
Canned Tomato Paste MT											
Mexico		0	0	0	0	7,350	0	0	0	0	5,290
Peru		0	0	0	0	654	0	0	0	0	543
Israel		821	43	1,617	192	3,524	809	30	1,423	135	3,065
Other Countries		234	45	344	122	2,167	234	38	348	109	2,095
Subtotal:----		1,055	88	1,961	315	13,694	1,043	68	1,771	244	10,993
Canned Tomato Sauce MT											
European Union		563	304	1,022	588	9,222	360	495	1,308	854	15,934
Canada		437	504	837	959	5,655	467	410	828	829	5,352
Dominican Republi		214	130	423	204	1,986	158	75	309	130	1,465
Other Countries		96	213	336	377	3,102	113	229	735	634	7,613
Subtotal:----		1,310	1,150	2,618	2,129	19,965	1,097	1,208	3,181	2,447	30,364
Canned Tomatoes MT											
European Union		4,806	5,484	8,497	9,890	48,631	1,985	2,343	3,376	4,201	19,156
Canada		199	214	712	409	7,096	112	110	338	219	3,450
Israel		160	715	2,288	2,053	6,418	91	425	1,261	1,221	3,653
Other Countries		532	349	955	689	3,444	256	192	503	349	1,720
Subtotal:----		5,697	6,762	12,452	13,040	65,589	2,444	3,069	5,478	5,989	27,979
Canned Mushrooms MT											
India		212	401	473	1,221	3,571	422	675	1,035	2,031	6,467
Indonesia		1,130	1,052	2,287	2,292	16,192	2,457	2,016	4,979	4,558	34,027
China, Peoples Re		3,112	2,154	5,471	3,860	34,448	4,816	3,169	8,374	5,467	50,298
Other Countries		1,363	697	2,495	1,403	13,047	2,888	1,696	5,443	3,276	27,532
Subtotal:----		5,818	4,305	10,727	8,776	67,258	10,583	7,556	19,831	15,332	118,324
Frozen Broccoli MT											
Canada		18	2	19	2	172	21	2	23	2	157
Mexico		12,689	14,108	26,115	27,436	148,645	8,100	8,506	16,295	16,710	91,092
Guatemala		2,072	2,146	4,692	4,244	20,617	1,524	1,532	3,363	3,135	14,806
Other Countries		0	0	0	0	24	0	0	0	0	25
Subtotal:----		14,779	16,257	30,826	31,682	169,458	9,645	10,040	19,682	19,847	106,080
Frozen Cauliflower MT											
Canada		53	69	121	180	749	67	44	102	129	609
Mexico		2,319	3,684	5,007	5,700	16,424	1,832	2,430	3,688	3,777	12,283
Guatemala		144	55	268	193	1,284	111	46	196	123	1,022
Other Countries		1	23	4	114	272	3	14	4	47	147
Subtotal:----		2,517	3,832	5,400	6,187	18,729	2,013	2,534	3,989	4,076	14,060
Frozen Potatoes MT											
European Union		40	88	79	176	582	37	54	81	103	375
Canada		21,864	31,503	41,264	62,476	286,083	13,205	19,415	25,090	38,236	168,663
New Zealand		0	0	0	0	71	0	0	0	0	86
Other Countries		4	4	8	8	72	12	12	24	26	199
Subtotal:----		21,909	31,595	41,351	62,660	286,808	13,254	19,481	25,196	38,365	169,323

U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region		Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996	Nov FY 1996	Nov FY 1997	Oct-Nov FY 1996	Oct-Nov FY 1997	Oct-Sep FY 1996
Pistachios, Nsh	MT										
Turkey		39	10	44	40	516	153	26	177	128	1,942
Singapore		0	0	0	0	1	0	0	0	0	7
Hong Kong		0	0	0	0	0	2	0	2	0	2
Other Countries		0	0	0	0	0	0	0	0	0	1
Subtotal:----		40	10	45	40	517	154	26	179	128	1,952
Cashew Nut	MT										
Brazil		2,042	2,036	3,728	4,577	25,908	9,358	9,174	17,338	20,481	117,019
India		2,316	2,298	4,935	6,547	28,903	11,749	11,361	25,089	31,717	143,602
Mozambique		290	185	614	500	3,434	1,203	633	2,466	1,711	12,718
Other Countries		260	529	714	1,217	4,424	1,154	2,371	3,188	5,096	18,977
Subtotal:----		4,908	5,048	9,990	12,841	62,669	23,464	23,539	48,080	59,005	292,315
European Union	MT										
Canada		8	6	24	15	104	41	33	122	85	542
Turkey		103	181	104	301	168	111	257	113	451	185
Other Countries		545	706	844	1,408	3,607	2,043	3,453	3,023	6,777	14,554
Subtotal:----		656	893	973	1,725	3,928	2,195	3,744	3,259	7,313	15,417
Pecans, Nsh	MT										
European Union		0	0	0	0	0	0	0	0	0	0
Greenland		0	0	0	0	0	0	0	0	0	0
Mexico		4,850	3,941	5,757	5,780	15,267	4,929	8,123	5,785	11,567	15,699
Other Countries		0	0	0	0	0	0	0	0	0	0
Subtotal:----		4,850	3,941	5,757	5,780	15,267	4,929	8,123	5,785	11,567	15,699
Roses	M										
Guatemala		2,239	1,543	5,982	4,366	40,509	336	244	894	726	6,352
Colombia		37,365	40,619	81,325	92,880	590,276	6,776	9,320	14,225	20,557	123,965
Ecuador		19,205	21,893	38,267	46,519	234,493	3,509	4,415	6,879	9,187	47,404
Other Countries		2,705	2,835	6,963	7,869	54,019	888	1,199	2,351	2,889	23,236
Subtotal:----		61,513	66,890	132,537	151,634	919,298	11,509	15,177	24,349	33,359	200,957
Carnations	MIXED										
Guatemala		0	0	0	0	0	20	137	60	216	1,369
Colombia		0	0	0	0	0	9,567	9,181	15,967	17,162	107,577
Ecuador		0	0	0	0	0	355	292	628	490	4,809
Other Countries		0	0	0	0	0	45	116	105	136	1,258
Subtotal:----		0	0	0	0	0	9,987	9,726	16,759	18,004	115,014
Champ & Sprk Wine	KL										
European Union		4,602	5,307	11,390	11,565	29,976	46,175	52,809	117,408	126,817	335,410
Chile		18	11	35	14	80	64	28	99	38	334
Australia		13	23	19	44	121	48	104	72	200	514
Other Countries		3	34	19	51	115	9	117	108	186	354
Subtotal:----		4,636	5,375	11,464	11,673	30,292	46,296	53,057	117,687	127,241	336,611
Ft & Verm Wine	KL										
European Union		869	670	2,013	1,486	8,626	2,226	1,638	4,899	3,721	21,364
Bermuda		0	5	0	5	16	0	15	0	15	46
Argentina		0	0	12	0	19	0	0	25	0	29
Other Countries		0	110	0	110	5	0	170	0	170	13
Subtotal:----		869	785	2,025	1,601	8,666	2,226	1,824	4,924	3,907	21,453
Other Grape Wine	KL										
European Union		21,370	26,975	47,062	58,698	280,760	88,560	109,339	191,073	230,289	979,786
Chile		5,998	8,734	11,639	15,032	55,970	11,545	16,004	21,136	28,170	116,316
Australia		1,886	2,535	4,004	5,725	23,057	8,861	12,431	18,914	27,251	110,972
Other Countries		1,871	2,045	3,385	4,321	24,723	4,003	4,723	7,299	8,999	46,753
Subtotal:----		31,126	40,290	66,090	83,776	384,511	112,969	142,498	238,422	294,709	1,253,827
Wine, Other Products	KL										
European Union		525	754	1,153	1,433	4,612	608	966	1,317	1,879	5,877
Canada		129	130	239	249	1,540	152	126	276	307	1,743
Japan		164	175	354	318	1,665	898	880	1,776	1,619	7,953
Other Countries		123	77	183	137	922	202	153	299	252	1,824
Subtotal:----		941	1,137	1,928	2,137	8,740	1,860	2,124	3,668	4,057	17,397

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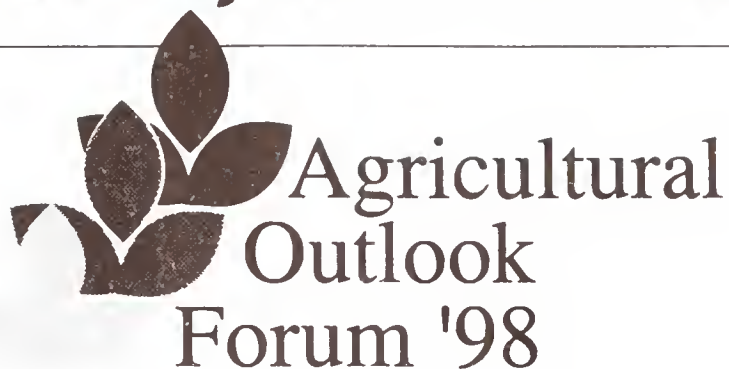
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